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THEORY AND PRACTICES OF LAW & PUBLIC ADMINISTRATION

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ADMINISTRATIVE AND LEGAL PROBLEMS REGULATION OF OPEN BIDDING APPEALS

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Abstract. The article identifies the problems of administrative and legal regulation of appeals of open tenders at the national level, which are recognized as one of the most serious threats to economic security and stable development of the country, especially in crisis situations. The author used the following research methods: dialectical, comparative-legal, formal-logical, special legal methods.

It was established that the gradual Europeanization of national legislation in the above-mentioned area, slow digital transformation, non-involvement of the public in issues of contesting open tenders, affect the effectiveness of the Antimonopoly Committee of Ukraine in resolving cases regarding contesting open tenders, significantly complicate the implementation of anti-corruption policy, create new factors for abuses, change the mechanisms of public administration, which creates new challenges for the national legal system. Ways of implementing positive foreign experience in the legal regulation of contesting open tenders in Ukraine are proposed. The directions of further scientific research in the field of administrative and legal regulation of contesting open tenders during martial law in the context of European integration have been clarified.

Key words: open bidding procedures, subject of appeal, Antimonopoly Committee of Ukraine.

Introduction. The purpose of the article is to find out the administrative and legal regulation of contesting open tenders on the basis of a thorough and comprehensive analysis of scientific, provisions of current and prospective legislation of Ukraine and foreign countries, law enforcement practice.

Despite the significant development of administrative and legal science, today not enough attention is paid to the specifics of the legal regulation of contesting open tenders under martial law. This is because martial law creates special conditions that require rethinking many legal mechanisms, including administrative legislation, strategies to combat violations in the field of open bidding and guarantees of citizens' rights.

In particular, some aspects of contesting public procurement are explored in the works of M.V. Afanasieva, O.I. Baik, V.O. Bass, I.H. Bogatyuk, V.O. Golub, , A.T. Komzyuka, M.A. Komzyuka, T.G. Korzh-Ikaeva, O.P. Kotlyarenko, S.O. Kuznichenko, S.V. Kulyk, E.A. Lipii, V.V. Lobko, O.P. Mandryky, T.P. Minky, O.I. Ostapenko, V.Y. Pashinsky, M.M. Prokhorenko, M.I. Rustamova, A.S. Slavko, D.B. Stupak, A.V. Tymoshenko and others. However, it is necessary to state the absence of a comprehensive legal act that would fully and comprehensively regulate the administrative and legal regulation of contesting open tenders. Therefore, the study of relevant problems is extremely relevant and has great theoretical and practical significance. This article will contribute to the creation of effective ways and mechanisms of combating problems and negative manifestations in the field of contesting open tenders in Ukraine.

The main part. In order to achieve the goal set in the article, it is necessary to solve the following tasks: characterize the problems of administrative and legal regulation of contesting open tenders; to characterize the system of normative and legal foundations of administrative and legal regulation of contesting open tenders; to analyze the control functions of authorized entities in the field of contest-

ing open tenders; to develop specific ways of improving the administrative and legal system regulation of appeals of open tenders under martial law in the context of European integration.

Today, the issue of public procurement is one of the most acute problems, which today has gone far beyond the boundaries of purely economic topics. The situation in this area remains uncertain and conflictual, and all participants in the public procurement process note their inefficiency and the presence of numerous abuses. The public procurement market is quite significant in terms of its volume – UAH 120 billion, and the problems that arise in it affect the state of other industries, the quality of public administration, etc. The main problems relate primarily to the legal and institutional framework of the public procurement system. The Antimonopoly Committee of Ukraine (authorized body), which is a quasi-judicial body, is the key body in the open tender appeal system in accordance with current legislation.

Open tenders are one of the most widespread and important mechanisms for ensuring transparency, fair competition and compliance with legality at all stages of the open tender procedure. They are a key factor in effective administration of state resources and prevention of corruption.

However, despite the legally established procedures, violations may occur in the process of organizing and conducting open tenders, which lead to restriction of competition, discrimination of participants or illegal alienation of property.

Research material and methods. The author used the following research methods: dialectical, comparative-legal, formal-logical, special legal methods.

Despite the fact that pre-trial appeal mechanisms (appeal to the auction organizer and/or authorized bodies) are designed to ensure prompt resolution of disputes, in practice they often demonstrate insufficient efficiency. This may be caused by a number of factors that undermine the confidence of participants and interested persons in this stage of protecting their rights.

In many cases, the auction organizer is a directly interested party in the results of the auction or may be related to the persons whose actions are being challenged. This can lead to a biased consideration of complaints and a reluctance to admit one's own mistakes or violations.

Even in cases where the organizer recognizes the complaint as well-founded, there are no effective mechanisms to enforce the decisions made by it. This may lead to complaints being ignored or formally responded to.

Auction organizers do not always have sufficient legal qualifications for objective and comprehensive consideration of complex legal issues that may be contained in complaints.

Consideration of complaints by the organizer may be of a formal nature, without proper investigation of the evidence and justifications of the complainant. This can lead to unjustified refusals to satisfy complaints.

Uncertainty of the terms of consideration, the procedure for submitting additional documents, holding meetings with the complainant can create conditions for abuses and prolonging the process.

Insufficient transparency of decision-making by the organizer. The organizer's decision based on the results of the complaint review is not always sufficiently motivated and substantiated, which makes it difficult to understand the reasons for the rejection or partial satisfaction of the complaint.

Overloading of authorized bodies (for example, AMCU). Although the AMCU is a more independent body, a significant number of complaints submitted to it for consideration can lead to a delay in their consideration and a decrease in the efficiency of responding to violations. Limitation of the powers of authorized bodies. In some cases, the authority of authorized bodies to take effective measures to respond to detected violations may be limited. For example, they may not have the right to directly cancel illegal contracts or prosecute wrongdoers. Lack of effective control over the activities of authorized bodies. Insufficient control by society and the state over the activities of pre-trial appeal bodies can lead to their inefficient performance of their functions.

Insufficient trust of participants in pre-trial mechanisms. Due to the above-mentioned problems, participants and interested parties may not believe in the effectiveness of pre-trial appeals and immediately go to court, which overloads the judicial system.

Directions for improving the effectiveness of pre-trial appeal mechanisms can be classified according to certain criteria. The first criterion is to ensure the independence and impartiality of pretrial appeal bodies. The essence of this criterion is the creation of mechanisms that minimize the influence of interested parties on the process of considering complaints. The second criterion for establishing the mandatory implementation of the decisions of pre-trial appeal bodies. Introduction of mechanisms of control and responsibility for non-implementation of well-founded decisions.

The next criterion for improving the qualifications of persons responsible for considering complaints. Ensuring the appropriate level of legal knowledge and understanding of the specifics of conducting open tenders. The fourth criterion is the introduction of clear and transparent complaints handling procedures. Which consists in establishing regulations regarding deadlines, the procedure for submission and consideration of documents, and decision-making. Also, the next criterion is the provision of proper motivation and responsibility of pretrial appeal bodies for high-quality and timely consideration of complaints. Extension of powers of authorized bodies. Providing them with effective tools for responding to detected violations. Ensuring the openness and publicity of decisions made based on the results of complaints consideration. Implementation of effective feedback mechanisms with complainants and accounting of their opinion regarding the effectiveness of the appeal procedure.

Improving the effectiveness of pre-trial appeal mechanisms will allow for prompt resolution of a significant part of disputes, reduce the burden on the judicial system, and increase confidence in open tender procedures. This, in turn, will contribute to ensuring legality, transparency and efficiency in this important area.

Results and their discussion. The work of Yu.O. Avramets, M.P. Bublii, A.M. Brovdiy, I.V. Vlyalko, Ya.V. Horbatyuk, O.A. Danylyuk, V.G. Datsyuk, A.A. Zagrebelska, N.G. Zdyrko, V.P. Iordanov, V.S. Konstantinova, O. O. Krytenko, N. V. Kulak and others.

Unfortunately, in the above-mentioned works, the procedures for holding and contesting open auctions are fragmentarily defined, certain types of violations during open auctions that may be grounds for appeal are considered, and the appeal procedure at various stages of auctions is not investigated, and the judicial practice on contesting open auctions is not fully considered. In our opinion, it is necessary to pay special attention to the analysis of the effectiveness of the existing appeal mechanisms and the problems that arise in practice.

According to V.B. Averyanova, the legislation on public procurement in Ukraine is a key tool for regulating relations between customers and suppliers (contractors, service providers), an opportunity to protect rights in the field of public procurement when they are violated.

Andriyko O.F., Bevzenko V.M. drew attention to the main reasons for receiving complaints to the AMCU: deliberately complicated requirements for open bidding, intentional violations of the terms of open bidding by customers.

Having analyzed the legislation on public procurement, it is possible to determine ways to overcome the problem of prolonging the terms of consideration of complaints.

First, amendments to the legislation and internal regulations of appeals bodies in order to simplify and speed up the process of handling complaints, increase the number of staff and improve the qualifications of employees of appeals bodies and courts (Kodeks administratyvnoho sudochynstva Ukraini, 2017). Secondly, ensuring adequate resource and technical support of appeals bodies and courts, increasing responsibility for violation of the time limits for consideration of complaints. Thirdly, implementation of effective mechanisms for monitoring compliance with deadlines, active use of information technologies, optimization of electronic systems for submission and consideration of complaints. In addition, it improves coordination between the various bodies involved in the appeal

process, with avoiding the abuse of procedural rights by the parties by establishing clear rules and consequences of such abuses. Establishing clear criteria for determining the complexity of cases and differentiating the terms of their consideration.

Overcoming the problem of prolonging the terms of handling complaints is an important task to ensure the effective functioning of the open bidding appeal system and to protect the rights of all interested parties. This will help increase confidence in bidding procedures and strengthen legality in this area.

In our opinion, the ways to solve problems with proving violations are:

– Expanding participants' rights to access to information: Statutory consolidation of the organizers' obligation to provide participants with copies of documents related to the bidding procedure at their request (with the exception of information that

– constitutes a commercial secret of other participants) (Postanova Verkhovnoho Sudu, 2023);

– Ensuring mandatory recording of key stages of the bidding procedure: Establishing requirements for keeping detailed protocols, audio and video recording of important procedural actions;

– Strengthening responsibility for manipulation of documentation and provision of false information.

– Ensuring the protection of witnesses: Creation of mechanisms to protect persons who provide information about violations from possible pressure or persecution;

– Providing appeals bodies and courts with broader powers to demand evidence: Ensuring the possibility of independent collection of evidence, conducting examinations, etc.;

– Introduction of mandatory publication of minutes of meetings of tender committees and justifications of decisions made.

– Improving the qualifications of participants and their representatives in matters of gathering and filing evidence (Postanova Velykoyi Palaty Verkhovnoho Sudu, 2018; Postanova Verkhovnoho Sudu, 2022).

– Ensuring the transparency of the work of electronic procurement systems and the possibility of conducting an independent audit of their work.

– Unification of judicial practice regarding the assessment of evidence in cases of contesting open tenders.

Solving problems with proving violations will contribute to increasing the effectiveness of the appeal procedure, ensuring fairness and legality in conducting open tenders, as well as reducing the level of corruption in this area.

The procedure for contesting open tenders, although designed to ensure legality and transparency, is not itself free of corruption risks. Unscrupulous participants, organizers or officials may use appeal mechanisms to achieve their own selfish goals, thus distorting the purpose and principles of fair competition.

The main corruption risks associated with the open tender appeal procedure:

Procurement complaints: Bidders may submit known unfounded or formal complaints in order to delay the procedure, create obstacles for competitors or obtain certain advantages (for example, time to prepare a better offer, pressure on the customer to make a favorable decision). The order of such complaints can be made both by competitors and by the customer himself (for example, to eliminate an unwanted winner or legalize one's own violation);

Bribery of members of appeal bodies;

Collusion between the complainant and the organizer: In some cases, the complainant and the organizer of the auction may enter into a collusion to artificially create grounds for appeal and subsequent cancellation of auctions with a favorable result for them (for example, to conduct re-auctions with a predetermined winner).

Using the appeal as a tool of pressure: Participants can use the threat of filing a complaint or an already filed complaint as a tool of pressure on the customer in order to obtain certain preferences or change the terms of the contract;

Corruption at the stage of implementation of decisions of appeal bodies and courts: Even in the case of a legal decision based on the results of the complaint review, there is a risk of corruption at the stage of its implementation (for example, delaying implementation, making illegal demands);

Non-transparency of the complaint handling process: Insufficient transparency of individual stages of complaint handling (for example, closed meetings, lack of detailed justification of decisions) can create conditions for corrupt practices;

Use of mediators: In the appeal process, mediators may appear who, for a fee, promise to influence the decisions of appeal bodies or courts, which is a direct corruption risk;

Manipulation of appeal deadlines: Unscrupulous participants or organizers may try to manipulate the deadlines for submitting and processing complaints in order to obtain illegal advantages.

We offer a system of measures to minimize corruption risks when contesting open tenders: increasing the transparency of the appeal procedure: Ensuring the openness of meetings of appeal bodies (if possible), publishing decisions with detailed justification, online broadcasting of meetings; ensuring the independence and impartiality of members of appeal bodies and judges: Implementation of effective mechanisms of selection, control and responsibility for persons who make decisions based on the results of complaints; increased responsibility for filing groundless complaints. Establishment of fines or other types of liability for abuse of the right to appeal; implementation of effective mechanisms for the prevention and detection of conflicts of interest. Ensuring transparency of property statuses and connections of persons involved in the appeal process; increased public scrutiny and anti-corruption bodies for the appeal process; provision of mandatory recording of all key stages of complaint consideration (audio and video recording of meetings); optimization of the terms of consideration of complaints: Establishing reasonable and clear terms of consideration and ensuring their observance; improving the qualifications of persons involved in the appeal process in matters of anti-corruption legislation and ethics; introduction of effective channels for reporting corruption offenses and ensuring protection of whistleblowers; active use of information technologies: Ensuring the security of electronic appeal systems against unauthorized intervention.

The minimization of corruption risks in the open bidding appeal procedure is an important element of ensuring the integrity and efficiency of the entire system of public procurement and alienation of state/municipal property. This will help increase trust in state institutions and create a favorable business environment.

To improve the efficiency and fairness of the open tender appeal procedure, a comprehensive approach is needed, including the improvement of both legislative regulation and the practical application of existing norms.

Based on the current legislation, we offer the main ways to improve the legislation. The first direction is the unification and systematization of legislation: the development of a single legislative act regulating the procedure for contesting open tenders, regardless of their type (public procurement, privatization, lease, etc.), with the aim of eliminating inconsistencies and establishing uniform principles and procedures; codification of rules relating to appeals to ensure their accessibility and comprehensibility.

The second direction. Detailing and clarification of procedures: clear regulation of deadlines, procedure for submitting documents, conducting meetings, decision-making at all stages of the appeal; establishment of an exhaustive list of grounds for appeal at each stage of bidding; clarifying the rights and obligations of the complainant, the auction organizer and appeal bodies.

The third direction. Strengthening liability for violations: establishing tougher sanctions for violations of the law on open bidding, including financial fines, disqualification of officials and participants; introduction of liability for submitting knownly groundless complaints for the purpose of abusing the right to appeal; strengthening of responsibility for non-implementation of decisions of appeal bodies and courts.

The fourth direction is the optimization of the terms of appeals and consideration of complaints: establishing realistic and mandatory terms for submitting and considering complaints at all stages; ensuring proper control over compliance with these terms; implementation of procedural economy mechanisms to speed up the consideration of cases.

The fifth direction of ensuring the independence and impartiality of appeal bodies: establishing clear criteria for the selection and appointment of members of appeal bodies; introduction of mechanisms for the prevention and settlement of conflicts of interest; ensuring the financial and organizational independence of appeal bodies.

The sixth direction – expansion of access to information: legislative consolidation of the right of participants to receive complete and timely information about the bidding procedure and the decisions made; ensuring mandatory publication of minutes of meetings of tender committees and justifications of decisions.

The seventh vector of improvement of the legislation regarding the appeal of open tenders is the improvement of judicial appeal: specialization of judges who consider cases regarding the appeal of open tenders; unification of judicial practice in this category of cases; ensuring the efficiency of the trial.

Ways to improve appeal practice:

1. Improvement of qualifications of participants and representatives:

– Conducting training programs and seminars on the legislation on open tenders and appeal procedures.

– Encouraging participants to engage qualified legal consultants.

2. Improving the work of pretrial appeal bodies:

– Ensuring the appropriate level of competence and impartiality of persons who consider complaints.

– Implementation of clear and transparent internal complaints handling procedures.

– Ensuring proper justification of the decisions made.

– Monitoring the effectiveness of pretrial appeal bodies and taking measures to improve it.

3. Activation of public control:

4. Implementation and effective use of information technologies:

– Further development and improvement of electronic appeal systems.

– Ensuring the possibility of online broadcasting of meetings of appeal bodies (upon agreement of the parties).

– Implementation of electronic document flow at all stages of the appeal.

5. Strengthening of anti-corruption measures:

– Implementation of effective mechanisms for the prevention and detection of corruption offenses in the appeal process.

6. Increasing the level of legal culture and awareness:

The implementation of these ways of improvement will contribute to the creation of more public trust in state institutions.

In the science of administrative law, the practice of the application of legislation regarding contesting open tenders, the existence of three vectors has been revealed: 1) research into the field of open tenders in an inter-industry aspect; 2) study of the "administrative procedure (pre-trial) appeal of open tenders", features of their application, their content and characteristics; 3) the study of judicial procedure (public legal disputes in administrative courts, commercial courts), which goes beyond the scope of our research. Within the framework of the first vector, there are works that examine various aspects of appeal open tenders (in the fields of economic, civil, information law) with a fragmentary focus on administrative and legal regulation, and there are scientific works devoted directly to the administrative and legal regulation of public procurement and specific issues of this institute. In turn, research on the topic of administrative and legal regulation of appeals to open tenders covers not only the theoretical aspects of the administrative (out-of-court) nature of appeals to open tenders, but also

focuses on the practical features of their pre-trial alternative version of dispute settlement with specifics, including during martial law.

Attention is paid to procedural and procedural aspects of consideration and resolution of relevant administrative cases. The tasks and the list of stages of contesting open tenders are clarified, namely the stages of violation of the procedure of contesting open tenders, consideration and resolution of the complaint, appeal of the complaint, implementation of the decision issued by the Antimonopoly Committee of Ukraine (Commission). Each stage and actions of the stages of contesting open tenders are analyzed. The content of the European integration reforms of Ukraine in the field of administrative and legal regulation of contesting open tenders, the state of implementation of the acts of the European Union in the national legislation is outlined. The list of relevant projects and initiatives in the field of administrative and legal regulation of contesting open tenders implemented in Ukraine within the framework of European integration processes has been determined.The directions of further scientific research in the field of overcoming corruption in the field of public procurement during martial law in the context of European integration have been clarified.

The classification of problems of administrative and legal regulation of contesting open tenders in the conditions of martial law is given. They are divided into three groups – organizational, regulatory and procedural. The first group of problems arose as a result of force majeure circumstances that arose as a result of Russia's armed aggression. In particular, these are problems the lack of administrative and legal regulation of the appeal of open tenders, as one of the procedures, as well as the problem of determining the specifics of such an appeal under certain administrative and legal regimes (for example, martial law, digitalization, and others).

It is outlined that the Law of Ukraine "On Administrative Procedure" does not apply to the administrative procedures of contesting open tenders, as the latter have their own specifics and are regulated by the general norms of the Law of Ukraine "On Public Procurement". Each separate administrative procedure of public procurement, including the procedure of open tenders, is administrative in nature and can be challenged only in the administrative procedure.

It is described that the administrative and legal stage of open tender appeals is carried out with the help of an electronic document (complaint) in the information field between the subject of the appeal and the appeal body and aims to stop violations in the field of open tenders using the tool of the electronic procurement system.

The position that contesting open tenders is an intrusive procedure designed to protect the interests of the state in the effective spending of public funds is analyzed.

Attention is paid to the scientific understanding of the features of administrative procedures of public procurement: 1) they are mostly open (public) in nature, that is, the procedures are conducted in such a way that the parties and other interested persons have access to the state of affairs in the process of implementing such a procedure; 2) are mostly implemented in electronic form; 3) aimed at ensuring the proper functioning of the public procurement system.

It is outlined that the problems of administrative procedures for public procurement appeals are mediated by public-law relations between the complainant and the Antimonopoly Committee of Ukraine, which is vested with administrative powers and reviews the complaint of an interested person in an administrative manner.

Discussion. Ensuring compliance with legislation during open tenders is an important factor in preventing corruption, ensuring effective use of public funds and legal alienation of state and communal property.

Despite the existence of a legal framework regulating the procedure for contesting open tenders, there are certain imperfections that can make it difficult for interested parties to do so effectively. These shortcomings can lead to a delay in the appeal process, ambiguous interpretation of norms, insufficient effectiveness of the decisions of appeal bodies, and other negative consequences.

The main shortcomings of the legal regulation of the procedure for contesting open tenders are the disparity and fragmentation of the regulation. The procedure for contesting open tenders is regulated by various legal acts depending on the field of tenders (public procurement, privatization, lease of state/municipal property, etc.). This can lead to inconsistency of norms, different levels of detailed procedures and make it difficult to understand the general principles of appeal. Certain provisions of the law governing appeals may be vague or open to different interpretations. This can lead to subjectivity in the consideration of complaints and decision-making by appeal bodies and courts. In some cases, the legislation may not regulate individual stages of the appeal procedure in sufficient detail (for example, the procedure for submitting evidence, holding meetings of appeal bodies, making decisions), which can create room for abuse or delaying the process. Decisions of pre-trial appeal bodies (especially auction organizers) are not always effective or fully implemented. The lack of proper mechanisms for monitoring the implementation of these decisions can devalue the very institution of pre-trial appeal.

In some cases (e.g. court fees, legal fees) the financial costs of an appeal can be significant, which may deter participants and interested persons from using this mechanism to protect their rights.

There is a risk of dependence of appeals bodies (especially auction organizers) on the persons whose actions or decisions are appealed, which may affect the objectivity of complaints consideration. Lack of effective mechanisms.

Even in the case of a positive court decision, the process of its implementation can be difficult and long, which actually nullifies the efforts of the complainant. In some aspects, the national legislation on open tender appeals may not fully meet international standards in the field of public procurement and protection of participants' rights.

Prolongation of time limits for consideration of complaints is one of the most common and significant problems in the procedure of contesting open tenders both at the pre-trial and at the judicial stages. This phenomenon can have negative consequences for all stakeholders, including complainants, bidders and society at large.

The reason for the delay in considering complaints is the overloading of appeal bodies and courts. Some complaints may relate to complex legal issues, require a detailed analysis of a significant amount of documents and additional research, which objectively increases the time for their consideration. The absence of clear regulations on individual stages of complaint consideration or the presence of gaps in the legislation can create opportunities for delaying the process, insufficient resource provision of appeals bodies and courts, lack of qualified personnel, technical equipment or funding can also slow down the processing of cases.

Participants in the appeal procedure may use various procedural tools (for example, filing multiple motions, appealing interim decisions) in order to delay the consideration of the case. Insufficient control over compliance with the established deadlines for considering complaints and the absence of effective mechanisms of responsibility for their violation can contribute to delaying the process.

In cases where the resolution of a complaint requires interaction between different public authorities, insufficient coordination can lead to delays.

Information and technical problems in electronic technical systems. Adversely affecting appeals in the field of public procurement, technical failures or deficiencies in the operation of the Prozorro electronic system can complicate and delay the process of filing and handling complaints.

Prolonged consideration of a complaint may result in the violations complained of by the participant remaining uncorrected for a considerable period of time, causing him losses or depriving him of the opportunity to participate in the bidding on legal grounds.

Prolonged consideration of complaints can lead to significant delays in conducting open tenders, concluding contracts and meeting the needs of customers or the state/community in the disposal of property.

If the appeals process is lengthy and ineffective, participants and stakeholders may lose confidence in this mechanism for protecting their rights and refuse to use it.

Delays in handling complaints can create favorable conditions for unscrupulous bidders or winners, allowing them to consolidate illegal bidding results.

Prolonged processing of cases can lead to increased costs both for the complainants (for example, for legal services) and for the state (for the maintenance of appeal bodies and courts).

Circumstances may change during the long period of consideration of the complaint, and the subject of the appeal may lose its relevance.

Prolonging the consideration of disputes in the field of public procurement and privatization can negatively affect the country's investment attractiveness.

Eliminating the mentioned shortcomings will contribute to increasing the efficiency and legitimate interests of participants and interested persons, as well as strengthening legality and transparency in the field of conducting open tenders.

One of the key obstacles on the way to effectively challenging open tenders is the difficulty in proving the facts of violations of the law. Bidders and interested parties often face significant difficulties in gathering and providing adequate and admissible evidence to support wrongdoing or decisions by the auctioneer.

Current legislation has the main problems with proving violations during bidding: limited access to information: Bidders often do not have full access to the organizer's internal documentation, minutes of tender committee meetings, justifications for decisions made, and other information that could confirm the existence of violations. Organizers are not always willing to provide such information, citing commercial confidentiality or other restrictions; lack of obligation to record all stages of the procedure; manipulation of documentation: There is a risk that organizers of tenders may manipulate documentation (make retrospective changes, hide important documents, falsify protocols) in order to hide violations or complicate their proof; dependence of witnesses: Persons who may have information about the violation (for example, members of tender committees, employees of the organizer, other participants) may be dependent on the organizer or have their own interests, which prevents them from providing truthful testimony; the difficulty of establishing a causal relationship. Even if the fact of violation is established, it can be difficult to prove.

Technical difficulties with fixing violations in electronic systems. When conducting electronic auctions, technical failures or manipulations in the work of electronic systems may occur, the proof of which requires special knowledge and access to system logs, which are often inaccessible to participants. Insufficient qualifications of the complainants. Participants and interested persons do not always have sufficient legal knowledge and experience to correctly collect and process the evidence necessary to substantiate their complaint. Absence of effective mechanisms for obtaining evidence by appeal bodies and courts. Complaint handling bodies do not always have sufficient powers and resources to independently collect the necessary evidence, placing the main burden of proof on the complainant. Counteraction by the auction organizer. Bidders may resist providing information or documents necessary to prove violations, citing various legal restrictions or internal rules. Ambiguity of judicial practice regarding the evaluation of evidence. The lack of uniform approaches in judicial practice regarding the assessment of evidence in cases of contesting open tenders can make it difficult to predict the outcome of the trial.

Conclusion. In our opinion, the directions for improvement of the normative and legal regulation of the appeal procedure are the unification and systematization of the legislation. Development of a single legislative act that will regulate the procedure for contesting open tenders in various areas, with the aim of eliminating inconsistencies and ensuring uniform principles. In addition, it is a clarification and detailing of individual provisions.

Amendments to the legislation in order to more clearly and unambiguously formulate the norms governing the appeal procedure.As well as the introduction of clear and mandatory deadlines for considering complaints at all stages, strengthening control over the implementation of decisions of pretrial appeal bodies and court decisions, reducing the financial burden on complainants during appeals, ensuring the independence and impartiality of bodies that consider complaints, increasing the transparency of the activities of appeal bodies. The harmonization of national legislation with international standards in the field of open tender appeals, the implementation of effective mechanisms of responsibility for violation of the complaint review procedure will contribute to the improvement of the administrative and legal regulation of open tender appeals.

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INTERNATIONAL AND EUROPEAN STANDARDS AS A METHODOLOGICAL BASIS OF UKRAINIAN LABOUR LAW

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Abstract. The article examines the role of international and European standards in forming the methodological basis of Ukrainian labour law. The system of international standards of the International Labour Organization (ILO), the United Nations (UN), as well as European standards of the European Union and the European Social Charter are analyzed. The methodological significance of international standards for the development of national labour legislation, their role as a source of law, an instrument for interpreting norms and a basis for harmonization of legislation are considered. Particular attention is paid to the processes of implementation and adaptation of international norms in the context of Ukraine's European integration aspirations. Specific ILO conventions, EU directives and their impact on the reform of Ukrainian labour legislation are analyzed. The main problems and challenges of implementing international standards are identified, including gaps in the transposition of norms, insufficient control mechanisms and the need for systematic adaptation of legislation. It is substantiated that international standards constitute not only a formal source of law, but also a methodological basis for modernizing labour relations, ensuring decent work and social protection of workers. Promising directions for further harmonization of Ukrainian labour law with international and European standards in the conditions of martial law and post-war recovery are determined.

Key words: labour law, international standards, International Labour Organization, European Union, European Social Charter, implementation, harmonization of legislation, ILO conventions, EU directives, methodology of labour law.

Introduction. Labour law in Ukraine is currently undergoing a profound transformation driven by European integration processes, the need to modernise social and labour relations, and the adaptation of legal regulation to the challenges of the contemporary labour market. In this context, international and European labour standards acquire particular importance not only as benchmarks for law-making activities, but also as a methodological foundation for reforming national labour legislation and for the development of labour law doctrine.

The relevance of this research is determined by several interrelated factors. First, Ukraine, as a member of the International Labour Organization (ILO) and a state that has declared a strategic course towards full membership in the European Union, has assumed international legal obligations to implement international and European labour standards. Second, the ratification by Ukraine of more than 70 ILO conventions and the signing of the Association Agreement with the EU have created normative and institutional prerequisites for harmonising national labour legislation with European standards (Bogush L, 2024). Third, under the conditions of martial law and in view of the prospects for post-war recovery, particular importance is attached to ensuring decent working conditions, effective social protection of workers, and the modernisation of labour relations on the basis of international standards (Burlai T. ets, 2025).

Special relevance is attached to the study of the methodological significance of international labour standards, as they shape the conceptual foundations of labour law, determine its basic regulatory principles, and serve as guidelines for both legislative activity and law enforcement practice (Dashutin

H. ets, 2022). In the context of the prolonged process of codification of Ukrainian labour legislation, the issue of compliance of draft versions of the new Labour Code with international and European standards has become critically important (Zvarych R., 2023).

Analysis of Recent Research and Publications. The issues surrounding international and European labour law standards constitute the subject of ongoing academic debate. Comprehensive studies on the role of ILO conventions in the reform of Ukrainian labour legislation have been conducted by Fedorova (Fedorova N., 2019), who substantiates the necessity of systematically incorporating international standards into the codification process of labour law and analyses the mechanisms of their implementation. Danylova and co-authors examine international principles and standards of labour law as a foundation for improving national legislation, focusing on the fundamental principles of the ILO and their reflection in Ukrainian law (Danylova V. et al., 2022).

Issues related to the adaptation of the regulatory framework on occupational safety and health to European standards are addressed in the works of Malko and co-authors (Malko A. et al., 2022), which systematize the requirements of EU directives and identify key gaps in Ukrainian legislation. Kyselova analyses the implementation of EU labour standards in the process of drafting a new Labour Code of Ukraine (Kyselova O., 2023). Specific directions of implementing international standards, particularly in the field of combating undeclared work, are examined by Bogush (Bogush L., 2024).

The purpose of this article is to provide a comprehensive study of international and European standards as a methodological foundation of Ukrainian labour law, to determine their role in shaping the conceptual framework of national labour legislation, and to identify existing problems and future prospects for the implementation of these standards in the context of Ukraine's European integration aspirations.

Results and Discussion. International labour law standards constitute a coherent system of norms, principles, and recommendations developed by international organizations with the aim of regulating labour relations at the global level. A central position within this system is occupied by the standards of the International Labour Organization (ILO) and the United Nations (UN), which establish universal benchmarks for national legal systems.

The International Labour Organization, founded in 1919, is a specialized agency of the United Nations mandated to develop and supervise compliance with international labour standards. As of 2024, the ILO has adopted 190 conventions and 206 recommendations covering virtually all aspects of labour relations (Fedorova N., 2019). Ukraine has ratified 71 ILO conventions, which creates legal grounds for their application as an integral component of national legislation pursuant to Article 9 of the Constitution of Ukraine (Ostroverkh A., 2019).

ILO conventions are classified according to several criteria. Based on their significance, they are divided into fundamental, priority, and technical conventions. The eight fundamental conventions include: Convention No. 29 concerning Forced or Compulsory Labour (1930); Convention No. 87 concerning Freedom of Association and Protection of the Right to Organise (1948); Convention No. 98 concerning the Right to Organise and Collective Bargaining (1949); Convention No. 100 concerning Equal Remuneration (1951); Convention No. 105 concerning the Abolition of Forced Labour (1957); Convention No. 111 concerning Discrimination in Respect of Employment and Occupation (1958); Convention No. 138 concerning Minimum Age for Admission to Employment (1973); and Convention No. 182 concerning the Worst Forms of Child Labour (1999) (Danylova V. et al., 2022). All of these conventions have been ratified by Ukraine and constitute the normative foundation of national labour legislation.

In the sphere of labour relations, a particularly significant role is played by Convention No. 154 concerning the Promotion of Collective Bargaining (1981) and Convention No. 98 concerning the Right to Organise and Collective Bargaining (1949) (Dashutin H. et al., 2022). These instruments establish international standards for collective bargaining regulation as one of the core mechanisms of social dialogue.

The issue of undeclared work is primarily regulated through ILO recommendations and the practice of their application. The ILO regards undeclared employment as a systemic threat to social stability and national security and recommends that Member States implement comprehensive measures aimed at its detection, limitation, and prevention (Bogush L., 2024). In the context of its European integration aspirations, Ukraine is required to adapt national approaches to labour regulation in line with these recommendations. Ostroverkh substantiates that ILO conventions occupy a special position within the hierarchy of sources of Ukrainian labour law (Ostroverkh A., 2019). They prevail over norms of ordinary legislation while remaining subordinate to the Constitution of Ukraine. In cases of conflict between the provisions of the Labour Code of Ukraine and a ratified ILO convention, the latter shall prevail, a position consistently confirmed by the case law of the Supreme Court.

Venediktov examines the growing role of ILO instruments in Ukrainian judicial practice (Venediktov S., 2020). An analysis of court decisions demonstrates an increasing tendency to rely on ILO conventions in the resolution of labour disputes – both to substantiate judicial reasoning and to interpret national legal norms. In particular, ILO international standards are applied in cases concerning discrimination, unlawful dismissal, violations of freedom of association, and non-payment of wages.

The United Nations, in turn, establishes universal human rights standards within which labour rights are recognized as an integral component. The key instruments in this area include the Universal Declaration of Human Rights (1948), the International Covenant on Economic, Social and Cultural Rights (1966), and the International Covenant on Civil and Political Rights (1966) (Danylova V. et al., 2022).

Article 23 of the Universal Declaration of Human Rights enshrines the right of every person to work, to free choice of employment, to just and favourable conditions of work, to protection against unemployment, to equal pay for equal work, to just and equitable remuneration, as well as the right to form and to join trade unions. These provisions constitute the foundational basis of international labour law (Danylova V. et al., 2022).

The International Covenant on Economic, Social and Cultural Rights further elaborates labour rights, including the right to work (Article 6), the right to just and favourable conditions of work (Article 7), the right to form and join trade unions and to strike (Article 8), and the right to social security (Article 9). As a State Party to the Covenant, Ukraine is obliged to ensure the progressive realization of these rights within its national legal system (Danylova V. et al., 2022).

European labour law standards specify international approaches and define practical benchmarks for the harmonization of Ukrainian labour legislation. In the context of European integration, these standards are formed within two interconnected yet institutionally autonomous systems: the law of the European Union and the system of the Council of Europe, primarily represented by the European Social Charter. For Ukraine, which has declared the strategic objective of acquiring EU membership and is a member of the Council of Europe, both systems are of fundamental importance for the development of national labour law.

European Union labour law constitutes one of the most dynamic and well-developed branches of EU law. It is based on the founding treaties, in particular the Treaty on the Functioning of the European Union (TFEU), acts of secondary legislation (directives and regulations), as well as the case law of the Court of Justice of the European Union (Kyselova O., 2023).

The core principles of EU labour law are enshrined in Articles 151–161 of the TFEU and include the promotion of employment, the improvement of living and working conditions, adequate social protection, the development of social dialogue, investment in human resources, and the fight against social exclusion (Kyselova O., 2023). These principles are given concrete normative expression through numerous directives that establish minimum standards for the legal regulation of labour relations.

A framework instrument in the field of occupational safety and health is Directive 89/391/EEC on the introduction of measures to encourage improvements in the safety and health of workers at work.

It enshrines general principles of occupational risk prevention, the protection of workers' safety and health, the elimination of risk factors, as well as the provision of information and training to employees (Malko A. et al., 2022). Pursuant to the EU–Ukraine Association Agreement, Ukraine is obliged to ensure the transposition of the provisions of this directive into national legislation (Petrovska N. et al., 2023).

Of particular importance is Directive 2003/88/EC concerning certain aspects of the organization of working time, which establishes minimum standards regarding working hours, rest periods, and annual leave (Zvarych R., 2023). Specifically, it provides for a maximum weekly working time of 48 hours, a minimum daily rest period of 11 consecutive hours, a weekly rest period of at least 24 hours, and a minimum annual paid leave of four weeks. The harmonization of Ukrainian legislation with this directive is regarded as one of the priority directions of labour law reform (Zvarych R., 2023).

The current stage of development of EU labour law is characterized by its response to ongoing transformations in the labour market. Directive (EU) 2019/1152 on transparent and predictable working conditions establishes minimum requirements regarding the provision of information to employees about the terms of employment contracts and aims to enhance legal certainty in labour relations (Kyselova O., 2023). In the same context, particular attention should be paid to the Platform Work Directive (EU Platform Work Directive), adopted in 2024, which introduces regulatory standards for work performed through digital platforms (Burlai T. et al., 2022). The development of Ukrainian legislation with due regard to the provisions of this directive demonstrates a proactive approach to the harmonization process.

The European Social Charter (revised in 1996) constitutes a key instrument of the Council of Europe in the field of social and labour rights. Ukraine ratified the Charter in 2006, thereby assuming obligations in respect of 74 out of the 98 possible provisions (Stasiv O., 2022). The Charter enshrines a broad range of labour rights and establishes minimum social standards that States Parties are required to observe. Its distinctive feature lies in the existence of a supervisory mechanism in the form of the European Committee of Social Rights (ECSR). The Committee examines national reports submitted by States Parties and collective complaints, adopting decisions on the conformity of national legislation and practice with the provisions of the Charter (Stasiv O., 2022). Such decisions are of substantial importance for the interpretation and application of labour law norms in Ukraine.

The decisions of the ECSR influence the substance of Ukrainian labour law through several mechanisms: they function as an official interpretation of the Charter's provisions, establish criteria for assessing national legislation, stimulate legislative amendments, and are relied upon by national courts when interpreting legal norms (Stasiv O., 2022). In particular, decisions concerning Ukraine have revealed inconsistencies in the regulation of the minimum wage, working time, the right to strike, and other aspects of labour relations.

The standards of the European Union and those of the European Social Charter are complementary in nature and together form an integrated system of European labour standards. EU directives are characterized by a higher degree of normative detail and mandatory transposition, whereas the European Social Charter sets out general principles and minimum standards supported by a more flexible implementation mechanism (Kyselova O., 2023; Stasiv O., 2022).

For Ukraine, both systems are of legal and methodological significance. As a member state of the Council of Europe, Ukraine is obliged to comply with the provisions of the European Social Charter, while as a state aspiring to membership in the European Union, it must ensure the transposition of EU directives in accordance with the Association Agreement (Bogush L., 2024; Kyselova O., 2023). This creates a framework of dual obligations which, at the same time, enables a comprehensive and systemic approach to harmonizing Ukrainian labour legislation with European standards.

International and European standards perform a multifunctional methodological role within the system of Ukrainian labour law. They operate not only as formal sources of law, but also as a con-

ceptual foundation for the development of labour law doctrine, an interpretative tool for legal norms, and a guideline for both legislative activity and law-enforcement practice.

Pursuant to Article 9 of the Constitution of Ukraine, international treaties ratified by the Verkhovna Rada of Ukraine constitute an integral part of the national legal system (Ostroverkh A., 2019). Consequently, ratified ILO conventions and the European Social Charter have direct effect in Ukraine and may be applied by courts and other public authorities without the adoption of additional implementing acts.

International standards may also be viewed as an interpretative instrument. Even in cases where a relevant convention has not been ratified by Ukraine, it may still be used as an authoritative source for interpreting national labour legislation. ILO recommendations, despite lacking binding legal force, play an important role in clarifying the content of labour rights and obligations (Venediktov S., 2020). In a similar manner, the practice of the European Committee of Social Rights is of crucial importance for the interpretation of the provisions of the European Social Charter (Stasiv O., 2022). The Committee's decisions establish evaluative benchmarks for national legislation and law-enforcement practice, identify systemic shortcomings, and stimulate legislative reforms. Ukrainian courts and administrative authorities may rely on the decisions of the ECSR when interpreting national norms that correspond to the provisions of the Charter.

When international standards are considered as a methodological foundation for the reform of labour law, it should be emphasized that the mechanical transplantation of European norms without proper adaptation may lead to a decrease in the effectiveness of labour regulation. The reform of Ukrainian labour legislation, including the development of a new Labour Code, must therefore be carried out with due regard to international standards (Fedorova N., 2019), (Kyselova O., 2023). Fedorova emphasizes that ILO conventions should be systematically integrated into the codification process rather than referenced in a merely declarative manner (Fedorova N., 2019). Kyselova analyses the implementation of EU standards in the preparation of the draft Labour Code of Ukraine, highlighting the necessity of a contextualized transformation of EU directives that takes into account the specific features of the national legal system (Kyselova O., 2023).

In this regard, Tsyhanchuk provides a critical assessment of draft versions of the Labour Code from the perspective of their compliance with international standards (Tsyhanchuk N., 2021). The author identifies numerous inconsistencies, particularly with respect to working time, the duration of leave, dismissal procedures, and mechanisms of collective bargaining. Such deficiencies indicate insufficient integration of international standards into the law-making process and underscore the need for a methodological rethinking of approaches to legislative regulation.

The methodological significance of international standards becomes particularly pronounced in the context of the digital transformation of labour relations (Burlai T. et al., 2022).

The process of implementing international and European standards into the labour legislation of Ukraine represents a complex and multidimensional phenomenon. It encompasses not only the formal legal transposition of norms, but also the transformation of the legal system, institutional mechanisms, law-enforcement practice, and legal culture. Its effectiveness largely depends on the state's ability to ensure coherence between international obligations and the actual socio-economic conditions governing the functioning of the labour market.

One of the key challenges of implementation lies in the fragmented and inconsistent transposition of international and European norms into national legislation (Petrovska N. et al., 2023), (Tsyhanchuk N., 2021). In many cases, the harmonization process is limited to the formal reproduction of certain provisions of EU directives or ILO conventions, without due consideration of their systemic nature and internal logic.

Effective implementation of international standards is impossible without the operation of efficient institutional mechanisms for monitoring compliance (Bogush L., 2024), (Nahorna A. et al., 2022).

Even where international norms are formally incorporated into domestic legislation, their practical enforcement frequently remains declarative in character.

The implementation of international and European standards requires substantial financial, organizational, and human resources (Malko A. et al., 2022), (Petrovska N. et al., 2023). The European model of labour law is based on a high level of investment in occupational safety, risk prevention, staff training, and the institutional capacity of supervisory authorities.

The modernization of production equipment, the introduction of occupational safety management systems, the provision of personal protective equipment, and the training of occupational safety specialists require stable and continuous funding. Under conditions of limited budgetary resources, structural economic instability, and the consequences of martial law, these tasks become significantly more complicated (Burlai T. et al., 2025). As a result, international standards often remain normative reference points without adequate material foundations for their full-scale implementation.

A major obstacle to effective implementation is the insufficient level of legal culture and legal awareness among participants in labour relations (Malko A. et al., 2022), (Venediktov S., 2020). Many employers perceive international standards as abstract declarations lacking direct practical relevance, while employees frequently remain unaware of the scope of their labour rights and the mechanisms available for their protection.

The absence of a systematic legal education policy leads to situations in which even ratified ILO conventions and the provisions of the European Social Charter are rarely applied in everyday law-enforcement practice. This highlights the need to develop a sustainable culture of referencing international standards in the activities of courts, supervisory authorities, trade unions, and employers.

The legal regime of martial law creates specific conditions for the functioning of labour law and significantly complicates the process of harmonization with international standards (Burlai T. et al., 2025), (Zvarych R., 2023). On the one hand, the state is compelled to respond rapidly to security challenges, ensure national defence, and maintain the continuity of critical infrastructure, which may justify temporary restrictions on certain labour rights.

On the other hand, international labour standards retain their binding force even under emergency conditions, except in clearly defined cases of derogation. Zvarych, analysing the guarantee of a forty-hour working week during wartime, substantiates the necessity of adhering to the principle of proportionality between defence needs and the preservation of fundamental social guarantees (Zvarych R., 2023). This demonstrates that martial law cannot be regarded as a legitimate basis for a systemic departure from international labour standards.

Prospects for Harmonization. Despite the existence of numerous challenges, the process of harmonizing Ukrainian labour law with international and European standards demonstrates significant potential for further development.

First, a key перспектив lies in completing the codification of labour legislation based on the systematic integration of ILO conventions and EU directives. The new Labour Code should not merely formally reflect international standards, but also reproduce their methodological rationale – the priority of decent work, employment stability, social dialogue, and a preventive approach to the protection of workers' rights.

Second, an important direction involves the development of special legislation in areas requiring more detailed regulation. This includes the legal framework for work performed through digital platforms, sectoral models of occupational safety and health, as well as institutions of social dialogue, which would enable flexible and targeted implementation of international standards.

Third, strengthening compliance monitoring mechanisms represents a promising avenue, particularly through expanding the powers of labour inspectorates, introducing a risk-based approach, developing electronic monitoring systems, increasing liability for violations, and ensuring effective interagency coordination.

Fourth, enhancing the level of legal culture and professional awareness of international labour standards acquires fundamental importance. The development of educational programmes for employers and employees, the implementation of information campaigns, professional training for labour law specialists, and the integration of international labour standards into legal education curricula will create the necessary conditions for their effective operation.

Fifth, the intensification of social dialogue within the process of implementing international standards will contribute to balancing the interests of the state, employers, and employees, while also increasing public trust in reforms and strengthening their social legitimacy.

Sixth, the use of international technical assistance plays a significant role (Bogush L., 2024), (Kyselova O., 2023). The potential of the ILO, the European Union, and other international organizations can be effectively utilized in the preparation of draft legislation, the enhancement of institutional capacity of public authorities, the conduct of expert assessments, and the adoption of best international practices.

Seventh, particular importance attaches to the adaptation of international standards to the needs of Ukraine's post-war recovery (Burlai T. et al., 2025), (Burlai T. et al., 2022). In the reconstruction process, international labour standards may serve as a methodological foundation for state employment policy, ensuring a balance between economic growth and the principles of decent work, social protection, and sustainable development.

International and European standards constitute a comprehensive system of norms and principles that shape contemporary approaches to the legal regulation of labour relations. For Ukraine, their implementation represents not only the fulfilment of international obligations, but also a fundamental prerequisite for the modernization of labour legislation and the promotion of decent work.

Conclusion. The methodological significance of international standards is reflected in their function as a source of law, an instrument of legal interpretation, and a basis for legislative harmonization. At the same time, the process of their practical realization remains problematic due to its fragmented nature, limited resources, insufficient effectiveness of supervisory mechanisms, as well as challenges arising from the legal regime of martial law.

Prospects for further harmonization are associated with the completion of labour law codification, the development of specialized legal regulation, the strengthening of institutional control mechanisms, the intensification of social dialogue, and the use of international technical assistance. In the post-war period, international labour standards may serve as a methodological foundation for the restoration of the labour sphere and the sustainable socio-economic development of Ukraine.

Further academic research should be directed toward the analysis of practical mechanisms for the implementation of specific ILO conventions and EU directives, as well as the assessment of their impact on law enforcement and judicial practice.

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AIDING THE AGGRESSOR STATE: METHODS, FORMS, AND JUDICIAL PRACTICE

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Abstract. The article examines the concepts of "aiding the aggressor state" and "collaborationism" in the context of the ongoing armed conflict in Ukraine. Various methods of committing the crime are analyzed, including military, financial, political, informational, and technical support to the aggressor, as well as the transfer of intelligence data and participation in separatist movements. The study highlights the manifestation of aiding in digital environments and through international financial and communication channels. Judicial practice and scholarly approaches to the qualification of these offenses are reviewed, emphasizing the complexity of proving intent and the importance of interdisciplinary methods, including forensic psychological examination. The article stresses the need for a comprehensive response combining legal, social, and psychological mechanisms to effectively prevent and investigate crimes that threaten national security and state stability.

Key words: aiding the aggressor state, collaborationism, Article 111-2, criminal liability, armed conflict, military assistance, financial support, political assistance, informational warfare, cyber assistance, internal intent, forensic investigation, judicial practice, prevention, prosecution.

Problem Statement. The legal regulation of collaborationist activities and aiding an aggressor state under the conditions of an armed conflict is extremely relevant today. Despite the existence of specific provisions in the Criminal Code of Ukraine (Articles 111-1 and 111-2), the lack of a clear distinction between these criminal offenses in law-enforcement practice creates legal uncertainty, which may lead to inconsistent application of criminal law. At the same time, technological development, globalization, and the expansion of digital communications have significantly broadened the range of possible forms of aiding an aggressor state, including financial, political, informational, and technical assistance. This necessitates a systematic analysis of the methods of committing this crime and the formulation of clear criteria for differentiating collaborationism from aiding an aggressor state.

State of Research. The issue of criminal liability for aiding an aggressor state is relatively new, given its actualization in connection with the realities of armed conflict and the introduction of relevant legal norms into national legislation. Scholarly literature addresses various aspects of this issue, including forms of intentional actions aimed at assisting the aggressor state, judicial practice, and problems of criminal qualification (Dopiriak; Zahyney-Zabolotenko, 2024; Dudorov; Movchan, 2022; Mishchuk, 2023). Attention is paid to issues of collaborationist activity and its differentiation from aiding the aggressor state (Mokina, 2025; Shvets, 2025), as well as to the relationship between the method of committing the crime and the personality of the offender (Orzhynska; Senina, 2022). Theoretical and legal problems of criminalizing aiding the aggressor state have been examined within the framework of modern Ukrainian criminal law (Politova; Lehunova, 2025; Shlapachenko, 2023). At the same time, the problem of proving the subjective element of the crime, particularly internal intent, remains complex and requires further scholarly reflection, especially with regard to the use of forensic and forensic-psychological research methods.

The purpose of this study is to comprehensively examine the methods of committing the crime provided for in Article 111-2 of the Criminal Code of Ukraine under contemporary conditions of armed conflict, to clearly distinguish collaborationist activity from aiding an aggressor state, and to

develop recommendations aimed at improving the effectiveness of law enforcement and strengthening national security through the integration of criminal-law and socio-psychological approaches to counteracting this category of crimes.

Main Content. In law-enforcement practice, one of the most controversial issues of contemporary Ukrainian criminal law is the differentiation between the elements of crimes provided for in Articles 111-1 ("Collaborationist Activity") and 111-2 ("Aiding an Aggressor State") of the Criminal Code of Ukraine. The relevance of this issue is обусловлена both by the novelty of these legal norms and by the specific conditions of the armed aggression of the Russian Federation against Ukraine, under which a significant number of socially dangerous acts have a mixed or multi-component character.

Despite their common focus on protecting Ukraine's national security, the criminal-law purposes of these norms differ substantially, which necessitates clear doctrinal and practical differentiation.

The immediate object of the crime provided for in Article 111-1 of the Criminal Code of Ukraine is social relations in the sphere of ensuring sovereignty, territorial integrity, and the constitutional order of exercising public power in temporarily occupied territories. Collaborationist activity primarily encroaches upon the legitimacy of Ukrainian state authority by creating conditions for the functioning and consolidation of the occupation regime. Such acts are aimed at the institutionalization and stabilization of the occupier's power through participation in occupation bodies, implementation of regulatory, administrative, or educational standards of the aggressor state, and public support of decisions made by illegal occupation administrations.

In contrast, the crime provided for in Article 111-2 of the Criminal Code of Ukraine has a different immediate object–Ukraine's defense capability and national security in the military, economic, and informational spheres. Aiding an aggressor state consists in providing assistance that objectively enhances the aggressor's ability to carry out armed aggression or other hostile actions against Ukraine. This includes, inter alia, the transfer of military-related information, logistical or material support for the armed formations of the Russian Federation, financing, technological or organizational assistance, as well as facilitating the activities of the aggressor state's intelligence services (Dudorov; Movchan, 2022)

Thus, the key criterion for differentiating these offenses lies in the functional orientation of the act. Collaborationist activity is oriented toward establishing and maintaining control over territory and population, that is, toward ensuring the administrative capacity of the occupation authorities. Aiding an aggressor state, in turn, is aimed at achieving a specific military, economic, or informational result that strengthens the aggressor's capabilities in confrontation with Ukraine.

Differences are also evident in the characteristics of the subject of the crime. By its nature, collaborationist activity presupposes active participation in quasi-public relations and is generally associated with the offender's presence in temporarily occupied territory and the performance of functions related to governance or public activity. Aiding an aggressor state, however, may be committed by any natural person, regardless of citizenship, place of residence, or formal connection with the occupation administration.

In practice, situations of concurrence or aggregation of criminal norms may arise, where the same individual simultaneously participates in the activities of occupation bodies and provides direct assistance to the military or intelligence services of the Russian Federation. In such cases, qualification should be determined with regard to the factual role of the person and the dominant orientation of their actions. If the core content of the conduct consists in facilitating warfare against Ukraine, priority should be given to qualification under Article 111-2 of the Criminal Code of Ukraine, even if such actions were carried out under the guise of administrative or "civil" activity (Mishchuk, 2023).

Therefore, proper differentiation between collaborationist activity and aiding an aggressor state is of fundamental importance for ensuring uniform law enforcement and the realization of the principle of fairness in criminal liability under conditions of armed conflict.

At the same time, scholars propose various methods of committing the crime of aiding an aggressor state, «including: transferring to officers of the Russian FSB any available information about servicemen of the "Azov" regiment, participants of the ATO/JFO, pro-Ukrainian citizens, law-enforcement officers, volunteers, and others; assisting occupiers in loading grain for so-called "export"; discrediting Ukrainian state authorities; implementing and supporting decisions of occupation authorities aimed at the illegal integration and functioning of the Russian banking system in temporarily occupied territories; organizing inventories of material assets of higher education institutions, and other actions» (Orzhynska; Senina, 2022 : 102).

In our view, the listed methods do not exhaust all possible ways of committing this crime. Therefore, further analysis is required to consistently present our reasoning.

Next, we examine the forms in which aiding an aggressor state may manifest itself.

The first and most obvious form of aiding an aggressor state consists in providing it or its controlled structures with means that enable the initiation or continuation of military operations. These may include supplies of weapons, equipment, ammunition, or other military products that directly contribute to the escalation of the conflict. However, under modern conditions, aiding increasingly takes more complex and indirect forms, such as financial, logistical, or other support that ensures the functioning of the aggressor's military machine at all stages of the war. For example, financing the modernization of military infrastructure, providing resources for the creation of new military bases, or supporting such initiatives through commercial entities constitutes assistance no less significant than the direct supply of armaments.

One of the most significant forms of aiding an aggressor state is financial assistance. This may include both direct monetary transfers and investments in enterprises that contribute to the development of the aggressor's economy. Companies specializing in the production of military equipment and ammunition, as well as enterprises involved in the transportation, supply, or maintenance of military forces, often become the primary recipients of such investments. For example, state support of major energy companies that ensure the supply of energy resources for the military-industrial complex, or the financing of new manufacturing facilities producing military equipment, undoubtedly enhances the aggressor's ability to continue hostilities.

Detecting such financial flows requires comprehensive investigations, particularly through identifying international financial networks that may be used to finance aggression. This includes the analysis not only of direct transactions but also of complex smuggling schemes involving intermediaries such as shell companies or fictitious organizations (Shvets, 2025)

In such cases, an essential role is played by modern technologies for big data analysis, as well as specialized methods for tracing financial flows through multiple intermediary links. Although this significantly complicates counteraction, it remains critically important for international security.

Political and diplomatic aiding occupies a central place in the context of international relations, as it may have profound consequences for global stability and security. Support provided through political and diplomatic channels is not always limited to official acts or governmental declarations. Informal mechanisms of influence are often equally important, including private contacts between high-ranking officials or influential political actors who may use their status to support the aggressor or facilitate the realization of its interests.

A key element of political aiding consists in support expressed through public statements or coordinated diplomatic actions demonstrating alliance with or understanding of the aggressor. Such actions may take the form of public endorsements at international forums that justify or legitimize aggressive behavior, or abstention from condemnation within international organizations such as the United Nations or the European Union. This may also include voting on resolutions that enable the aggressor to pursue its policies without international accountability.

Another important form of political aiding involves diplomatic agreements that may serve as a façade for supporting aggression. These may include agreements providing economic, military, or other forms of assistance to the aggressor state, as well as the creation of strategic alliances that strengthen the aggressor's position on the international stage. Such agreements may form part of covert arrangements concealed from the public and the international community.

In this context, private channels of influence are no less significant. Individuals holding high public office may, through informal meetings, personal connections, or corporate interests, implement political decisions favorable to the aggressor. These may include closed-door meetings, unofficial diplomatic channels, or direct agreements between political actors that bypass formal procedures and provide diplomatic or political support for aggression (Mokina, 2023)

The analysis of political statements, diplomatic agreements, and channels of interaction between states is crucial for identifying actors who facilitate aggressive actions. Detailed examination of such materials helps uncover hidden intentions and strategies of support for the aggressor and enables the anticipation of potential diplomatic steps that may either intensify or mitigate aggressive tendencies on the international stage.

Acts of aiding, unlike collaborationism, are not confined by geographical boundaries, which is particularly significant in the modern world where virtual communication has become pervasive. Collaborationism is traditionally associated with cooperation with an enemy or occupation authorities within occupied territories, limited to a specific state or region. However, in a globalized environment characterized by instant communication and information exchange, geographical borders no longer serve as effective barriers to acts of aiding (Politova; Lehunova, 2025).

The Internet, social networks, and other digital platforms allow individuals and organizations across the globe to establish connections that facilitate aggressive actions even when they are physically located far from the conflict zone. These may include transnational corporations providing resources, financial institutions supporting illicit transactions, or individuals cooperating online with the aggressor by transferring information, funds, or technologies that sustain aggression. In this context, even geographically distant actions may have a substantial impact on the conflict.

Virtual communication, free from physical constraints, creates new opportunities for aiding an aggressor state. Individuals may cooperate through cyberattacks, target identification, information gathering and dissemination that undermine national security, or through the exploitation of financial systems to evade sanctions or support illegitimate regimes. Data-exchange technologies enable the creation of communication channels in which participants and their actions are difficult to trace, while virtual tools may be used to spread propaganda or disinformation, contributing to conflict escalation.

Thus, acts of aiding under conditions of modern digital technologies are not only geographically unrestricted but also global in nature. This underscores the importance of international cooperation and global response mechanisms for detecting and suppressing such acts, regardless of where they occur.

Informational and media aiding constitutes a crucial component of contemporary military and hybrid conflicts and has gained increasing importance in the context of information warfare. It includes propaganda, media manipulation, and activities within social networks that enhance the aggressor's legitimacy and public support while discrediting its opponents.

This phenomenon extends beyond traditional mass media such as television and radio to encompass new media, particularly the Internet, where the dissemination of disinformation, fake news, and misleading narratives can significantly influence public opinion and shape perceptions of reality.

Investigating this form of aiding requires a comprehensive analysis of the content and quality of publications, identification of information sources, and the establishment of links between media structures engaged in such activities and the aggressor state. This approach allows for the construction of an objective picture of how media may function as instruments for spreading aggressive narratives.

For instance, during Russia's war against Ukraine, the extensive use of false narratives by Russian state-controlled and pro-Russian media platforms–such as claims about "Nazis" in Ukraine–contributed to the dehumanization of Ukrainians and the construction of an enemy image in public consciousness (Shlapachenko, 2023).

Within the context of information warfare, particular attention should also be paid to social media platforms, which have become key spaces for manipulation and propaganda. Platforms such as Twitter (X), Facebook, TikTok, and Telegram are actively used for agitation, where automated bots, fake accounts, and coordinated propaganda campaigns facilitate the creation and dissemination of myths and false narratives beneficial to the aggressor. Investigating this aspect requires meticulous analysis of information flows, their sources, and temporal dissemination patterns.

Concrete examples illustrate the forms and impact of aiding an aggressor state. For instance, in 2022, pro-Russian media disseminated false news on social networks about so-called "Ukrainian offensives" in the Donbas region. They also circulated narratives claiming that "Ukrainian nationalists" were destroying civilian populations during hostilities in eastern Ukraine. Propaganda campaigns organized through Telegram channels attempted to convince foreign audiences that the war in Ukraine was a "civil conflict" without external aggression, while Wikipedia was sometimes used to smear Ukrainian nationalists and patriots.

Military and technical assistance–including the provision of weapons, high-tech equipment, or training for the aggressor's armed forces–requires investigations far beyond simple monitoring of deliveries or contracts. Effective analysis demands a comprehensive study of networks connecting arms manufacturers, contractors, and the aggressor state. Supply chains may be both direct and indirect, passing through intermediary companies that use informal channels for transactions (Shvets, 2025).

Special attention should be given to the key actors involved in weapons and technology transfers, including state-owned enterprises, private companies, and shell structures hiding behind civilian contracts. Challenges arise when transactions occur through informal channels, making them difficult to trace–for example, arms deliveries disguised as humanitarian aid, a frequent occurrence in various conflict zones (Dopiriak; Zahyney-Zabolotenko, 2024).

Even thorough formal agreement analysis may fail to reveal how and through whom technical or military equipment is transferred. Traditional investigative methods are often inadequate, especially for international schemes where participants may change registration countries, use offshore entities, or shell companies to conceal their intentions.

Modern analytical approaches, such as big data analytics, are increasingly used to track financial flows and uncover hidden links among participants, even when they attempt to obscure their actions through complex intermediary chains. Blockchain monitoring, social media surveillance, and transaction analytics can reveal missing links and identify the actual beneficiaries of illicit transfers.

International cooperation is essential, as perpetrators may operate globally, exploiting multiple jurisdictions to evade accountability. Successful investigations depend on the coordination of law enforcement and intelligence agencies, as well as state collaboration to detect and disrupt these criminal networks. Such approaches enhance transparency in international security policy while blocking channels of weapons and technical assistance. (Dudorov; Movchan, 2022)

The technologies supporting aggression may include not only weapons but also cyberattack systems, communication networks, and other components that enhance military effectiveness. This raises not only moral and legal responsibility but also global security concerns, as providing technical assistance to an aggressor can create threats for other states, especially in the digital and automated era. (Mishchuk, 2023)

Intelligence sharing represents one of the most dangerous forms of aiding, with critical implications for national security. If such information reaches the aggressor or its agents, it may be used to conduct precision strikes against key infrastructure, military units, or civilians. Intelligence may

include military positions, tactical operations, or technical data essential for operational planning. Proper protection of such information is paramount.

Data can be transmitted through secure channels used for intelligence exchange between states or individuals. Those with access may, intentionally or negligently, transfer information to the aggressor or its agents, facilitating targeted attacks. Civilian intermediaries or shell organizations can further complicate accountability, intentionally or inadvertently supporting strategic objectives of the aggressor.

For example, agents or employees of foreign corporations with access to defense secrets can significantly strengthen the aggressor's targeting capabilities. Cyberattacks may also extract sensitive data from military networks for precision strikes. Information on technical processes, systems, and equipment crucial for military operations allows the aggressor to monitor adversary positions and conduct high-precision attacks on energy or transport infrastructure.

In a globalized world, cyber-mediated intelligence transfer has become widespread. Perpetrators may target military and governmental systems to extract classified data (Politova; Lehunova, 2025) Intelligence collection on strategic military objects or defense plans can facilitate sabotage and threats to national security. Providing access to strategically significant information to an aggressor or its agents constitutes one of the most dangerous forms of aiding. Strategic data may include troop locations, critical infrastructure, and essential national security systems.

Access to technical processes, such as the development of new defense technologies or management systems, is especially critical for a state's defense. If an aggressor obtains such data, it can not only monitor forces but also conduct precision strikes on vulnerabilities with maximum effect (Mokina, 2023)

The information in question may include not only the locations of military units but also detailed data on the placement of strategic facilities, such as ammunition depots, command posts, and key infrastructure elements essential for the functioning of the defense system. Moreover, strategically important information may not be limited to documents or digital archives; it can also include technical assets such as software, algorithms, or data on technical processes used in the development or maintenance of military systems. Loss of control over such data can significantly weaken a country's defense capabilities, as it enables an aggressor to conduct targeted strikes on the most vulnerable sites, potentially affecting the course of military operations.

Access to this information provides the enemy with substantial advantages, allowing not only physical attacks on infrastructure but also the development of complex strategies to deceive or disrupt defense systems, thereby undermining national security. Another critical aspect is the provision of materials, equipment, or technical components that can directly or indirectly enhance the aggressor's defensive or offensive capabilities. Such support includes equipment for weapons production or storage and technical components that facilitate military operations, threatening not only Ukraine's security but regional stability.

Actions aimed at collecting or delivering information, processes, objects, or documents to the aggressor state or its agents can harm national interests. This may include selling or providing intellectual property, technologies, or processes potentially usable for aggression, such as improving military technologies or intelligence capabilities. The destruction or damage of documents containing critical national security information can prevent the proper acquisition or use of necessary data for defense, substantially weakening the state during wartime.

One of the most dangerous forms of aiding the aggressor is active participation in separatist movements or contributing to the destabilization of Ukraine. Such activity may involve building barricades, trenches, and other fortifications to slow or impede Ukrainian forces, allowing the aggressor to advance or maintain territorial control. These fortifications reduce the operational capacity of the Armed Forces of Ukraine and strengthen enemy positions, delaying strategic progress and providing the aggressor more time to consolidate or plan further attacks (Mokina, 2023).

Participation in hostilities against government forces or direct support for such movements constitutes an even clearer form of aiding, as it directly spreads violence and aggression within Ukraine, undermining sovereignty and stability, worsening the humanitarian situation, and endangering civilians. Another severe form of aiding includes participation in open military occupation or actions aimed at destroying critical infrastructure essential for state functioning, particularly during war. Sabotage acts–such as destroying bridges, roads, energy facilities, or other strategic infrastructure–create systemic destabilization, disrupt military operations, complicate logistics, and reduce operational efficiency, directly affecting battles and strategic advances.

This category also includes facilitating disruptions in key government services and enterprises crucial for defense. For instance, sabotage targeting production facilities of weapons or military equipment strikes directly at the nation's ability to resist. Interruptions in energy and communications networks, along with other forms of economic sabotage, can significantly weaken national defense, producing strategic consequences during armed conflict (Dopiriak; Zahyney-Zabolotenko, 2024)

Participation in such actions not only violates national interests but actively contributes to long-term weakening of the country's defense potential, providing the aggressor with opportunities for further attacks and destabilization at all levels.

Attention should be given to methods of intimidating civilians in occupied territories. This approach aims not only at physical or psychological violence but also at deeply demoralizing citizens to undermine their support for state authorities. Threats, repression, torture, and overt terror create an atmosphere of fear and hopelessness among civilians, forcing adaptation to the occupier's reality, even if it means supporting the occupation. Such terror causes physical and moral suffering while systematically eroding the resilience of local communities.

Perpetrators of these methods manipulate civilians' emotions, exploiting fear, uncertainty, and anxiety that often accompany wars or crises. In such situations, people act under the influence of their greatest concerns–the safety of their families and their own lives–creating opportunities for manipulation. Emotional manipulation can drive certain population groups to participate in acts of aiding the aggressor, collaborate with the enemy, or even support sabotage and terror. This adds complexity to law enforcement efforts, as combating this phenomenon extends beyond addressing specific criminals, requiring society to develop psychological resilience and the capacity to resist manipulation.

An integral part of this situation is the importance of establishing national programs aimed at enhancing the psychological readiness of the population to act in crisis situations, teaching individuals to recognize manipulations and emotional tactics intended to weaken their morale. Education and support for citizens' mental health should become essential components of the national security system.

Thus, aiding an aggressor state takes many forms, ranging from active measures aimed at destroying or weakening Ukraine's defense capabilities to less obvious forms of assistance, such as sharing intelligence or providing resources for military operations. Together, these elements form a complex picture with multiple components, collectively posing a serious threat to Ukraine's national security and independence.

Acts of aiding an aggressor extend far beyond legal analysis, as they not only violate the law but also touch upon deeper social and moral dimensions. Responses to such crimes should be based not only on legal norms and sanctions but also on human and social considerations, given that these phenomena have far-reaching consequences for public morality, the mental state of the population, and the social fabric of society. Therefore, addressing such actions requires a comprehensive approach, which considers not only legal aspects but also sociocultural factors, the psychological impact on people, and the overall strategy for societal response (Shlapachenko, 2023).

Fair punishment for acts of aiding is essential to protect fundamental rights and state stability. However, it is equally important to develop a deeper understanding of these crimes, since in many cases aiding an aggressor is not merely a legal violation but also a breach of fundamental moral order,

social relations, mutual respect, and trust. For this reason, beyond criminal sanctions, efforts should focus on social-psychological mechanisms to prevent such acts.

Ensuring individual rights is crucial, but legal protection alone is insufficient to resolve deep social contradictions. It must be recognized that acts of aiding can contribute to the formation of hierarchies among people, where some are perceived as inferior, threatening, or "secondary," while others are seen as legitimate representatives of authority or power. This can lead to social fragmentation, where a significant part of the population loses trust in state institutions, and another part loses trust in fellow citizens.

In this context, it is extremely important to preserve societal unity, foster a sense of shared responsibility for national interests and security, and cultivate national solidarity based on mutual respect, support, and the ability to compromise in challenging situations. Violations of this unity through acts of aiding create not only legal but also moral and ethical chasms within society.

Thus, combating acts of aiding must be multifaceted, incorporating legal, social, psychological, and ethical dimensions. This approach allows for effective responses to crimes while reducing the risk of recurrence, restoring and strengthening the foundations of social cohesion and national security (Dudorov; Movchan, 2022)

Classical criminology provides the epistemological basis for theorizing a general legal crime, which violates social and/or legal norms of a given society. Actors–criminals, victims, and law enforcers–can be identified, roles assigned, and legal means of protection are known. Acts qualifying as criminal offenses, along with their victims, are generally considered unique cases. The context in which these crimes occur is stable, and the principles of the rule of law ensure the protection of rights and the rendering of verdicts by a third party. Legal remedies exist to ensure justice, protect human rights in judicial proceedings, obtain compensation, and provide psychological and social support as well as reintegration into society after serving a sentence or recovering from victimization.

Conclusion. Aiding an aggressor state manifest in numerous forms, including financial, technical, informational, political, intelligence-related, and participation in destabilizing or separatist activities. Each form can significantly affect the state's defense capability and population security. In today's globalized and digitalized environment, geographical boundaries no longer limit acts of aiding, as international financial networks, the internet, social media, and digital platforms create new risks for the spread of aggression.

Counteracting such actions requires combining criminal-legal, socio-psychological, and technological approaches, including investigating financial flows, controlling the transfer of strategic and intelligence information, analyzing media and digital communication channels, and enhancing the population's psychological resilience. A clear distinction between collaboration and aiding supports fair law enforcement, the protection of national interests, and adherence to the rule of law, all of which are critical for ensuring state stability and societal security.

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DOCTRINAL APPROACHES TO DEFINING THE SUBJECT OF PROOF: CONTENT AND STRUCTURAL ELEMENTS

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Abstract. This article examines the subject of proof as a fundamental concept in the theory of evidence within criminal procedure law. Based on a comparative analysis of doctrinal approaches proposed by Ukrainian and foreign legal scholars, as well as an examination of the substantive law of Ukraine, France, Germany, the United Kingdom, Austria, and Canada, the article elucidates the essence, content, and structural elements of the subject of proof. The author emphasizes the significant discrepancies in understanding this category across different legal systems, which have practical implications for pre-trial investigation and judicial proceedings. The article demonstrates that a precise determination of the subject of proof is a prerequisite for effectively achieving the objectives of the criminal process and rendering lawful and reasoned procedural decisions. The study also analyzes potential approaches to defining the subject of proof in criminal proceedings under Article 191 of the Ukrainian Criminal Code.

Key words: Subject of proof, Criminal procedural proving, Circumstances subject to proof, Comparative law, Evidence theory, Pre-trial investigation, Legal facts.

Introduction. While examining the criminal law of Ukraine and other jurisdictions, including Common Law systems, we have noted inconsistencies in the approaches to evidence in criminal proceedings. Furthermore, the issue of the subject of proof, its significance, and its statutory regulation remains a subject of debate. The concept, content, and structural elements of the subject of proof are fundamental to achieving the objectives of criminal proceedings in every case, ensuring that the guilty are punished and the innocent are not held liable.

The main purpose of the article is to examine the subject of proof, its content, and structural elements by exploring doctrinal perspectives, analyzing legal acts, and synthesizing these to develop an original understanding of the subject of proof and the circumstances subject to proof. To achieve this objective, the following tasks have been set:

1) to analyze the doctrinal approaches of Ukrainian and foreign scholars regarding the subject of proof;

2) to examine legal acts in terms of the statutory recognition of the subject of proof as a concept within the codified acts of various jurisdictions;

3) to analyze the potential subject of proof in criminal proceedings under Article 191 of the Criminal Code of Ukraine.

The correct definition of the subject of proof is essential for criminal proceedings, as the realization of the purpose and objectives of the criminal process primarily depends on proving its constituent facts and circumstances. Currently, most legal practitioners face significant challenges in defining the subject of proof both in general and within specific criminal proceedings, which subsequently adversely affects pre-trial investigation results and the evidentiary process. An error in defining the subject of proof, stemming from a lack of knowledge regarding its constituent circumstances, can trigger either an exhaustive yet irrelevant or, conversely, a superficial establishment of facts subject to proof. This, in turn, complicates and sometimes precludes the rendering of lawful and well-founded procedural decisions in criminal proceedings.

Materials and methods. The empirical and normative basis of this study comprises the legislation of Ukraine, France, Germany, the United Kingdom, Austria, and Canada, as well as current case law. Furthermore, the scholarly works of leading Ukrainian and foreign experts in the field of criminal law and procedure were analyzed. To achieve the objective and address the designated tasks, a comprehensive set of general scientific and specialized legal methods was employed. The formal-legal method was applied to analyze the normative content of the subject of proof. The system-structural method was used to define the interrelationship between the general components of the subject of proof and the circumstances subject to proof in specific criminal proceedings. The comparative-legal method allowed for a juxtaposition of national and international doctrinal approaches to the subject of proof. The application of this multifaceted methodology ensured a comprehensive analysis of the subject of proof and enabled the identification of commonalities and differences in the perception of this category across various legal systems.

The results and discussion. The issue of the subject of proof in criminal proceedings has been investigated by such scholars of criminal procedure as Yu. P. Alenin, V. D. Bernaz, I. V. Hloviuk, V. P. Hmyrko, V. H. Honcharenko, Yu. M. Hroshevyi, O. V. Kaplina, Ye. H. Kovalenko, L. M. Loboiko, M. M. Mykheienko, V. T. Nor, M. A. Pohoretskyi, V. O. Popeliushko, D. B. Serhieieva, O. S. Starenkyi, S. M. Stakhivskyi, M. S. Strogovich, I. O. Sukhachova, V. M. Tertyshnyk, L. D. Udalova, V. V. Cherniei, S. S. Cherniavskyi, A. M. Cherniak, Yu. M. Chornous, S. A. Sheyfir, O. H. Shylo, M. Ye. Shumylo, and O. H. Yanovska, among others. The works of these researchers are foundational to both the science of criminal procedural law in Ukraine and the theories of criminal evidentiary law. Nevertheless, a unified approach to defining the concept of the «subject of proof» remains absent. This underscores the relevance of its study within the framework of modern criminal procedural science, particularly in light of the dynamic changes occurring in criminal procedural legal relations.

As aptly noted by Yu. M. Hroshevyi and S. M. Stakhivskyi (2007), criminal procedural proof, being cognitive in nature, permeates the entirety of criminal procedural activity and constitutes its primary scope and substance. It is entirely reasonable to assume that the effectiveness of pre-trial investigation and judicial proceedings is wholly dependent on its outcomes. The result serves as a criterion for assessing the fulfillment of such a task of the criminal process as ensuring a speedy, thorough, and impartial pre-trial investigation and trial, the achievement of which critically depends on the subject of proof.

The concept of the «subject of proof» is among the fundamental notions in the theory of evidence. Its theoretical and practical significance is consistently emphasized in criminal procedural literature; however, definitions of the concept itself remain ambiguous and require further investigation within the framework of modern criminal procedural science. It should also be noted that the current Criminal Procedure Code of Ukraine (CPC) does not contain a formal definition of the «subject of proof». Similarly, the legislation of foreign countries generally lacks this definition in their legal acts, a point we shall return to later.

In Ukrainian doctrine and practice, it is customary to equate the subject of proof with the set of circumstances listed in Part 1 of Article 91 of the CPC of Ukraine, namely: the event of the criminal offense (time, place, manner, and other circumstances); the guilt of the accused in committing the criminal offense, the form of guilt, motive, and purpose of the offense; the type and amount of damage caused, as well as the amount of procedural costs; circumstances that influence the degree of severity of the offense, characterize the personality of the accused, or aggravate or mitigate the punishment; circumstances that exclude criminal liability or serve as grounds for closing criminal proceedings; circumstances that provide grounds for exemption from criminal liability or punishment; circumstances confirming that money, valuables, and other property subject to special confiscation were obtained as a result of a criminal offense and/or constitute income from such property, or were intended (used) to induce a person to commit an offense, to finance or materially support it, or as a reward for its com-

mission, or constitute the object of a criminal offense, including those related to illicit trafficking, or were sought out, manufactured, adapted, or used as instruments or means of committing a criminal offense; and circumstances that serve as grounds for applying measures of a criminal legal nature to legal entities. However, a systemic analysis of these provisions suggests that the subject of proof is significantly broader and may possess an individual character due to its specification in each particular criminal proceeding. Furthermore, the current wording of Part 1 of Article 91 of the CPC of Ukraine creates preconditions for an accusatory bias. Despite various approaches in legal literature, the low efficiency and quality of pre-trial investigations necessitate new scholarly research into these issues.

It is essential to consult the doctrine of the criminal process of Ukraine. V. O. Popeliushko emphasizes the interconnection between the circumstances of the «subject of proof» and decisions in a criminal case, defining the «subject of proof» as the range of all legally significant factual circumstances provided for by criminal and criminal procedural law, which are subject to proof for making decisions in criminal proceedings as a whole or on specific procedural and legal issues (Popeliushko, 2001, p. 185). The opinion of M. A. Pohoretskyi is also pertinent, as he defines the «subject of criminal procedural proof» as a circle of circumstances (structural elements of the subject) to be established in criminal proceedings. He underscores that this range of circumstances is normatively defined in Part 1 of Article 91 of the CPC of Ukraine and specified in the relevant provisions of the Criminal Code of Ukraine regarding a particular criminal offense (Pohoretskyi, 2007, p. 576). V. V. Vapniarchuk interprets the concept of the «subject of proof» as a circle of circumstances, determined both by law and the discretion of a particular subject, which must be established in every criminal proceeding (Vapniarchuk, 2017, p. 408). This scope is sufficient for making the appropriate procedural decision or performing a specific procedural action. O. S. Starenkyi notes that the «subject of proof» expresses the goal of proof in criminal proceedings and constitutes the set of circumstances subject to proof (Art. 91 of the CPC of Ukraine), while the «limits of proof» represent the boundaries within which the investigation of all circumstances of the criminal proceedings is carried out (Starenkyi, 2014). Emphasized that the concepts of «subject of proof» and «limits of proof», though interrelated, are not equivalent; each has its own unique legal content and purpose in criminal procedural proof. The correlation between the «subject of proof» and the «limits of proof» remains a subject of debate; however, we consider it appropriate to explore this issue in further scholarly works.

Summarizing the above, we should note that to correctly define the «subject of proof» it is necessary to proceed from the premise that a concept, as a form of thought, is a way of reflecting reality where the object is revealed through a set of its essential attributes. Thus, we consider it appropriate to highlight the essential characteristics of the subject of proof in criminal proceedings:

1) it is a component of cognitive-practical and mental activity;

2) it must align with the CPC of Ukraine in the context of the tasks facing authorized subjects in criminal proceedings;

3) it encompasses facts and circumstances relevant to the correct resolution of the offense;

4) it consists in the specification and disclosure of those circumstances that constitute the ultimate goal of proof in criminal proceedings;

5) it is a fundamental category of the theory of proof.

Consequently, the subject of proof represents a fundamental category of evidence, consisting in the disclosure of the scope of circumstances (structural elements of the subject) to be established in criminal proceedings, as well as other circumstances relevant to the correct resolution of a specific case that are subject to proof in that particular proceeding. The subject of proof includes the circumstances normatively defined in Part 1 of Article 91 of the CPC of Ukraine; however, it is broader and is specified for a particular type of criminal offense, taking into account the provisions of the Criminal Code of Ukraine (Kolomiiets, 2022, pp. 192–200).

In exploring the concept of the «subject of proof,» we have already partially addressed the issue of its content. While the concept of the subject of proof defines the essence of this legal phenomenon and answers the question «what is it?», its content reveals its structure, elements, and the specific constituent circumstances, answering the question «what does it consist of?». Disclosing the content of the subject of proof is vital both for the scientific doctrine of understanding the subject of proof as a whole and for practical application, as it specifies which circumstances must be established, what evidence must be collected, and which procedural actions must be performed. The failure to establish, or the incomplete establishment of, any of the circumstances included in the content of the subject of proof leads to the adoption of unlawful and unsubstantiated decisions (Loboiko & Banchuk, 2014, p. 62; Bondarenko, 2024, pp. 197–198). According to dictionary definitions, «content» is the essence or internal peculiarity of something; it refers to certain properties and characteristic features that distinguish a phenomenon or object from similar ones (Busel, 2005, p. 467).

Within scientific doctrine, there is an approach asserting that the content of the subject of proof consists of: 1) a criminal-law element; 2) a civil-law element; 3) a criminal-procedural element.

The criminal-law element of the content of the subject of proof comprises circumstances whose proof and establishment allow for the correct legal qualification of a specific act as a criminal offense. These can partially include circumstances that also constitute the elements of the crime (corpus delicti).

The civil-law element of the content of the subject of proof consists of circumstances that have legal significance for resolving civil-law claims within the framework of the criminal process. These must be proven during the proceedings of every civil action in criminal justice and in cases of potential confiscation of the defendant's property (Vashchuk, 2007, p. 35).

The criminal-procedural element of the content of the subject of proof is formed by circumstances that influence the adoption of criminal procedural decisions in a specific criminal proceeding and are defined by law as grounds for such decisions, such as the dismissal of proceedings, the application of precautionary measures, or the conduct of a search (Loboiko & Banchuk, 2014, p. 172). It is worth noting that circumstances constituting the criminal-law element may sometimes also serve as circumstances for the criminal-procedural element. This approach allows for a systemic disclosure of the content of the subject of proof, demonstrating its multifaceted nature and its connection to various branches of law.

It should be noted that the relationship between the subject of proof and the elements of the offense (corpus delicti) remains a subject of debate despite a significant body of research; however, in our view, they should not be considered identical.

In Common Law jurisdictions, the content of the subject of proof in criminal cases is primarily defined through the concept of «elements of the offense.» The prosecution bears the burden of proving all elements of the offense as prescribed by the relevant statute or law (LexisNexis, n.d.; Salhany & Claxton, 2022). Furthermore, each element must be proven individually according to the «beyond reasonable doubt» standard (BLJ Solicitors, 2022; LexisNexis, n.d.; Salhany & Claxton, 2022; Judicial Commission of New South Wales, n.d.; Wikipedia, n.d.).

Applying the comparative-legal method, we concluded that, unlike Civil Law jurisdictions such as Ukraine, Common Law systems lack the statutory recognition of the «subject of proof» and the specific circumstances subject to proof. Nevertheless, our research revealed that despite the absence of a formal codified category for the «subject of proof» in the criminal process of Common Law countries, they possess a functional equivalent. This equivalent is comprised of the system of facts in issue (including preliminary facts, relevant facts, and facts that constitute the occasion, cause, or effect of facts in issue, as well as facts necessary to explain or introduce relevant facts) and the elements of the offense (actus reus and mens rea). Together, these components constitute the substance of what is recognized in Ukraine as the subject of proof in criminal proceedings (Western Law Students' Society,

2018, pp. 8, 45; Salhany & Claxton, 2022, p. 4; Evidence Act of Trinidad and Tobago, 2012). By analyzing various sources, we can conclude that «facts in issue» refer to any fact or facts from which, either by themselves or in connection with other facts, the existence, non-existence, nature, or extent of any right, liability, or disability, asserted or denied in any suit or proceeding, necessarily follows. Meanwhile, «elements of a criminal offense» are the constituent parts of a crime that the prosecution must prove according to the «beyond reasonable doubt» standard (The Evidence Act [Tanzania], 2025, p. 218; Indian Evidence Act, 1872; dJetlawyer, 2020; Manupatra, n.d.; Western Law Students' Society, 2018, p. 8; Power Legal, n.d.).

Thus, it can be noted that the basis of the content of the functional «subject of proof» in Common Law countries is a three-component structure of the elements of the criminal offense: 1) actus reus (criminal act, objective side) – the offense with which the accused is charged was committed. The prosecutor must prove that a certain act prohibited by law was carried out. This includes establishing the physical act, its consequences (for material offenses), and the causal link between the act and the consequences; 2) identity – the prosecutor must prove that the accused committed the crime, i.e., establish the identity of the offender. This issue is particularly important in cases where the offender's identity is not obvious; 3) mens rea (criminal intent, subjective side) – finally, it must be established that the accused intended to commit the crime, i.e., that it was a deliberate act or, in some cases, the result of their recklessness or gross negligence. The prosecutor must prove the mental element of the crime, i.e., that the accused possessed the appropriate state of mind at the moment of the act. Different crimes require different levels of mens rea: intention, recklessness, and negligence. However, intention should not be confused with motive. The reasons why a person commits a crime are not a matter for the court's consideration, although they may be important as circumstances confirming one of the three components. There are also certain crimes for which intent is not relevant; sometimes the accused may not even realize they are committing a crime. Such crimes are referred to as «strict liability offenses» and are not the subject of this discussion (Salhany & Claxton, 2022). Due to the lack of statutory recognition of the circumstances subject to proof in Common Law jurisdictions and a general list of such circumstances, we can assert that the «subject of proof» in the criminal proceedings of Common Law countries is shaped individually for each specific offense and even each individual criminal case. Among the shared features, we can observe an inseparable link between substantive and procedural law. Furthermore, it is noteworthy that Common Law jurisdictions employ a conditional division of facts into general («central») facts – «facts in issue» – and other supplementary facts (relevant, evidentiary, and preliminary facts). This approach bears a certain affinity with the classification of structural elements of the «subject of proof» found in Ukrainian doctrine.

Simultaneously, while analyzing the doctrine of German criminal procedural law, we can establish the existence and use of the term «subject of proof» – Beweisthema (German-Ukrainian Legal Dictionary, 2017, p. 95). However, no statutory recognition of this term or the specific circumstances it encompasses was identified, which indicates the individual character of the «subject of proof» in every criminal proceeding.

Thus, the concept of «Beweisthema» is absent from the German Code of Criminal Procedure (Strafprozessordnung – StPO). It is a doctrinal construct derived from general provisions on the collection of evidence (§ 244 StPO), the evaluation of evidence (§ 261 StPO), the presentation of factual circumstances in the judgment (§ 265 StPO), etc.; it serves to specify the range of facts to be established in a particular case. For instance, the provisions of § 160 StPO stipulate that the prosecutor shall investigate not only incriminating but also exculpatory circumstances and ensure the collection of evidence that might otherwise be lost. The prosecutor's investigation also extends to circumstances relevant to determining the legal consequences of the offense. To this end, the prosecutor may seek the assistance of the court. Unlike the Ukrainian CPC, which clearly defines the list of circumstances subject to proof in Article 91, the German Code of Criminal Procedure in § 160 StPO

establishes only a general duty for the public prosecutor's office to «investigate the circumstances» (Sachverhaltsaufklärung). The specific content of these circumstances is further defined by doctrine through the category of «Beweisthema» (subject of proof) and depends on the specifics of the particular case (Strafprozeßordnung, 2024).

At the same time, the subject of proof must be formulated with sufficient precision so that the court and the parties involved in the proceedings understand which fact is to be clarified. Vague, ambiguous, or broad formulations impede the collection of evidence and may lead to its rejection. In criminal proceedings, the subject of proof serves to clarify the event of the crime and circumstances relating to guilt and legal consequences. The subject of proof may pertain to both primary and secondary facts. The subject of proof is generally defined by the participants in the proceedings within the scope of the motions they submit. The court reviews it for compliance with the criteria of admissibility, relevance, and probative value (suitability), after which it decides on the examination of the evidence (MTR Legal Wiki, n.d.).

In the Austrian criminal process, the content of the «subject of proof» is revealed through the concept of «Beweisthema» (subject of proof) and the system of «Tatsachen» (facts) subject to proof and establishment (Golser, 2018, pp. 96). Referencing Austrian doctrine and judicial practice, the author proposes a clear gradation of facts to be established. This is critically important for understanding what constitutes the «subject of proof» and what serves merely as a means for its establishment (Golser, 2018, pp. 9–10). «Decisive facts» («Entscheidende Tatsachen») serve as the core of the «subject of proof» – facts upon which the following depend: which specific criminal act (qualification) has occurred; the presence of circumstances excluding punishment, justifying the person, or precluding prosecution; the establishment of facts determining the application of certain sanctions; the value of stolen property if it affects the qualification, etc. «Relevant facts» («Erhebliche Tatsachen») – these are facts significant for establishing the presence or absence of decisive facts. According to judicial practice, these refer to specific circumstances (evidentiary results) upon which assumptions regarding the so-called decisive facts are based (OGH, 2006). These are circumstances that do not constitute the offense themselves but allow for a logical conclusion regarding decisive facts (for example, an alibi: the accused's presence in a restaurant rather than at the crime scene) (Golser, 2018, pp. 19–32). In Ukrainian doctrine, such concepts are referred to as «evidentiary facts» or «intermediate facts».

Of particular interest is the identification of «subsumable facts» («Subsumierbare Tatsachen») – a category of aggregate facts forming a subset of decisive facts, highlighted by Professor Steininger. These facts describe events (circumstances) so clearly and completely that they can be directly «placed» under the legal norm (under the «Obersatz» – the hypothesis/disposition of the norm), namely tracing a direct link between the facts and the law. They serve as a conditional «bridge» between the real event and the legal qualification (Golser, 2018, pp. 31–35). According to Steininger's teachings, the concept of «subsumable facts» (subject to legal qualification) is narrower than the concept of decisive facts. Given the limited scope of our thesis and the subject of discussion, we believe this issue should be explored in other scholarly works. It should be noted that despite both systems being based on the inquisitorial (investigative) model of Civil Law, the criminal procedure of Germany and Austria is somewhat similar regarding the «subject of proof»; however, we cannot consider them fully identical. Thus, a distinction should be made between the approaches of the German and Austrian criminal procedural doctrines. While the German model (§ 261 StPO DE) emphasizes the free formation of judicial conviction within a single panel, the Austrian model (§ 258 StPO AT) maintains the specificity of evidence evaluation, taking into account the institute of classical juries and the strict formalization of grounds for overturning a verdict. Despite institutional differences, the criminal processes of Germany and Austria demonstrate unity in their approach to the standard of proof: it is based on the priority of «substantive truth» over procedural form and on a clear distinction between facts requiring «strict proof» (matters of guilt) and facts established in a «free manner» (procedural issues).

French criminal procedure – a classic mixed (Romano-Germanic) model that combines elements of the investigative (inquisitorial) and adversarial types – demonstrates a different approach to defining the content of the «subject of proof». Unlike Common Law countries, where the content of the «subject of proof» is determined by the elements of a specific crime, and the criminal process of Ukraine, where the content is commonly believed to be clearly defined by law, the French model provides greater freedom to the investigating judge (juge d'instruction) in determining the scope of circumstances subject to proof, with a unique emphasis on «inner conviction» (l'intime conviction) (Karnavas, 2016; Mermoz, 2019).

The Code de procédure pénale (Code of Criminal Procedure of France) does not contain a detailed list of circumstances subject to proof in a criminal case. The content of the «subject of proof» is determined by the substance of the indictment and the general principles of criminal law. The investigating judge is obliged to collect both incriminating and exculpatory evidence, reflecting the inquisitorial nature of the French process. The evaluation of evidence in the French system is based on the principle of «intimate conviction» (l'intime conviction). The judge assesses whether the circumstances forming the «subject of proof» have been proven based on their inner conviction, shaped by a comprehensive examination of the case. This approach is more subjective compared to the Common Law standard of «beyond reasonable doubt» (Karnavas, 2016).

Accordingly, in French criminal procedure, unlike the CPC of Ukraine (Art. 91), there is no statutory definition of the «subject of proof» (l'objet de la preuve). Doctrine structures it into three blocks: (1) elements of the crime, (2) qualifying circumstances, and (3) circumstances of punishment. The judge freely forms their «conviction», and the l'objet de la preuve is specified during the «instruction» (investigation) stage through the ordre de poursuite (Merle & Vitu, 1967).

Given the above, the approach of the Ukrainian legal scholar M. I. Bazhanov regarding the correlation between the elements of a criminal offense and the «subject of proof» is noteworthy. In his work, the scholar refers to historical data and notes that the «elements of a criminal offense», much like certain other institutes and terms of criminal law, originates from the criminal process – specifically its needs. These elements form the basis for the qualification of a criminal offense, and ignoring them can lead to the incorrect application of the norms of criminal procedure. Thus, by creating a system of mandatory objective and subjective features that define a certain act as a criminal offense, the «elements of the offense» is considered the «core» of the «subject of proof» and influences the «limits of proof» in a specific criminal proceeding. Consequently, when analyzing the «subject of proof», the elements of the crime are always considered its constituent part (Loboiko & Banchuk, 2014; Kolomiiets, 2022)

In our opinion, the «subject of proof» – in terms of its content and constituent elements – is broader than the «elements of the criminal offense», as it encompasses not only the circumstances that include the «elements of the criminal offense» (the object, objective side, subject, and subjective side) but also circumstances that do not affect the legal qualification of the offense yet remain criminally relevant (Zaporizhzhia National University, n.d.).

It should be emphasized that the Ukrainian legislator defined the normative basis for the content of the «subject of proof» by listing the circumstances to be proven in criminal proceedings in Part 1 of Article 91 of the Criminal Procedure Code of Ukraine: «1. In criminal proceedings, the following shall be subject to proof: the event of the criminal offense (time, place, manner, and other circumstances of the commission of the criminal offense); the guilt of the accused in committing the criminal offense, the form of guilt, motive, and purpose of the criminal offense; the type and amount of damage caused by the criminal offense, as well as the amount of procedural costs; circumstances affecting the degree of severity of the committed criminal offense, characterizing the personality of the accused, aggravating or mitigating the punishment, excluding criminal liability, or serving as grounds for closing the criminal proceedings; circumstances serving as grounds for exemption from criminal liability

or punishment; circumstances confirming that money, valuables, and other property subject to special confiscation were obtained as a result of a criminal offense and/or constitute income from such property, or were intended (used) to induce a person to commit a criminal offense, for the financing and/or material support of a criminal offense or as a reward for its commission, or constitute the object of a criminal offense, including those related to illicit trafficking, or were sought out, manufactured, adapted, or used as means or instruments for committing a criminal offense; circumstances serving as grounds for applying measures of a criminal-law nature and special confiscation to legal entities.».

Consequently, unlike the Continental system, where a single normatively defined «subject of proof» exists for all crimes, in the Anglo-Saxon system, the content of the «subject of proof» is determined by the specifics of a particular elements of the offense. There is no general list of circumstances subject to establishment in every criminal case – they depend on the elements of the specific crime (D. M. Paciocco and L. W. Stuesser, 2022).

Exploring the content of the «subject of proof» more deeply, we believe that its internal peculiarity lies in the structural elements of the «subject of proof» itself.

Structure is the interconnection of the constituent parts of a whole, whereas an element is a constituent part. Thus, the structural elements of the «subject of proof» in the theory of criminal procedural law are viewed as relatively independent, logically interconnected groups of legally significant circumstances, the establishment of which ensures the completeness and comprehensiveness of evidentiary activity in every criminal proceeding. As aptly noted in scholarly literature, the structuring of the «subject of proof» allows not only for the determination of the scope of circumstances to be proven but also for the organization of the evidentiary process in accordance with the functional purpose of each group of such circumstances (V. M. Tertyshnyk, 2018; O. V. Kaplina, 2016).

The following should be included among the structural elements of the «subject of proof»:

1) circumstances constituting the ultimate goal of proof in criminal proceedings (in Ukrainian legislation, these are the circumstances defined by Article 91 of the Criminal Procedure Code of Ukraine);

2) other circumstances relevant to the correct resolution of the case and subject to proof (doctrine usually includes intermediate («evidentiary») and auxiliary facts here).

Let us examine the content of the «subject of proof» in more detail, taking as a basis for analysis criminal proceedings regarding misappropriation, embezzlement, or seizure of property through abuse of office (Article 191 of the Criminal Code of Ukraine). It is worth noting that the complexity of proof under Article 191 of the Criminal Code of Ukraine is due to the multifaceted («tripartite») nature of this crime, which combines signs of an offense against property, a corruption component, and affiliation with economic («white-collar») crime. This combination of property, corruption, and economic aspects requires an integrated approach from the subjects of proof to establish the circumstances of the case. It is important to note that similar crimes against property are quite common in other countries; thus, this analysis may be useful not only for Ukrainian scholars.

Consequently, in criminal proceedings regarding misappropriation, embezzlement, or seizure of property through abuse of office, the following circumstances must be established:

The event of the criminal offense (Did the seizure, embezzlement, or misappropriation actually occur? Time, place, and manner of the act); The presence of the «elements of the crime» (the necessary components of the corpus delicti are required, but they are only a part of the «subject of proof», not identical to it); The guilt of the person (Did this person commit the crime? Did they have intent? Did they act with a profit motive?); Circumstances affecting the degree of responsibility (complicity; repetition; recidivism; position, access to property; form of organization, such as a group or conspiracy); Circumstances mitigating or aggravating the punishment (voluntary restitution; sincere repentance; cynicism, abuse of trust); The nature and amount of damage (value of the property; con-

sequences for the enterprise or institution); Causes and conditions that facilitated the crime (insufficient control; violation of financial discipline; gaps in the work of the enterprise's security service).

It should be noted that this list is not exhaustive and may change depending on the crime itself and its qualification. Thus, the ultimate goal of proof in criminal proceedings under Art. 191 of the CC – is the establishment of all seven groups of circumstances (paras. 1–7 of Part 1 of Art. 91 of the CPC), specified regarding: the disposition of Art. 191 of the CC (elements of the crime); the sanction of Art. 191 of the CC (for sentencing purposes); the specific circumstances of the case (individualization); in a volume sufficient for the adoption of a lawful, grounded, and reasoned decision (a verdict or other final decision).

Conclusion. Based on the study conducted, the following conclusions can be drawn:

1) the concept of the «subject of proof» belongs to the fundamental categories of the theory of criminal procedural proof; however, a single settled definition of this concept has not yet been formed in either Ukrainian legal science or judicial practice;

2) the «subject of proof» represents a range of legally significant circumstances, normatively defined in Part 1 of Article 91 of the CPC of Ukraine, which are nevertheless broader and specified regarding a particular type of criminal offense, taking into account the provisions of the Criminal Code of Ukraine. The «subject of proof» comprises three logically interconnected elements: a criminal-law element, a civil-law element, and a criminal-procedural element;

3) the structural elements of the «subject of proof» encompass circumstances constituting the ultimate goal of proof (defined by Art. 91 of the CPC of Ukraine) and other circumstances relevant to the correct resolution of the case (intermediate facts, auxiliary facts);

4) a comparative-legal analysis of the legislation of Ukraine, France, Germany, the United Kingdom, Austria, and Canada demonstrates the absence of a unified approach to the statutory recognition of the «subject of proof». The Civil Law system (Ukraine, France, Germany, Austria) provides for a normatively defined or doctrinally developed «subject of proof», whereas the Common Law system defines the content of the «subject of proof» through the «elements of the offense» and the concept of «facts in issue»;

5) in Common Law jurisdictions (the USA, Canada, the UK), the content of the «subject of proof» is determined by the elements of the crime: actus reus (criminal act), mens rea (criminal intent), and identity. Furthermore, the prosecution must prove each element individually according to the «beyond reasonable doubt» standard;

6) in German and Austrian criminal proceedings, the concept of «subject of proof» (Beweisthema) is a doctrinal construct that lacks statutory recognition but is widely used in judicial practice to specify the range of facts to be established in a particular case. The Austrian model identifies a gradation of facts: «decisive facts» (Entscheidende Tatsachen), «relevant facts» (Erhebliche Tatsachen), and facts subject to subsumption;

7) the French mixed model of criminal procedure provides greater freedom to the investigating judge in determining the scope of circumstances subject to proof, with a unique emphasis on the judge's «inner conviction» (l'intime conviction). French legislation does not contain a detailed list of circumstances of the «subject of proof»; instead, its content is defined through the elements of the crime and circumstances of punishment;

8) the «subject of proof» is a broader and more complex concept than the «elements of the criminal offense». Although the «elements of the crime» constitute the basis («core») of the «subject of proof» and influence the «limits of proof», the «subject of proof» also encompasses circumstances that are not part of the «elements of the crime» yet remain criminally relevant for the adoption of a lawful and grounded decision;

9) the practical application of the concept of the «subject of proof» in criminal proceedings regarding misappropriation, embezzlement, or seizure of property through abuse of office (Article 191 of

the CC of Ukraine) requires a comprehensive approach covering the establishment of: seven groups of circumstances in accordance with Part 1 of Article 91 of the CPC of Ukraine, specified regarding the disposition and sanction of Article 191 of the CC, as well as the individual circumstances of the specific case;

10) the correct definition and understanding of the «subject of proof» are critical for the effective conduct of pre-trial investigations and judicial proceedings, the prevention of errors during the evidentiary process, and ensuring the adoption of lawful, grounded, and reasoned procedural decisions in criminal proceedings.

The necessity for further scientific research in the field of the «subject of proof» is determined by the dynamic changes in criminal procedural legal relations, the low efficiency and quality of pre-trial investigations, the need for the unification of approaches, and the development of judicial practice.

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MODEL CASES IN UKRAINE VS. CLASS ACTIONS IN THE USA: SEARCHING FOR PROCEDURAL EFFICIENCY

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Abstract. In the face of overburdened court systems dealing with mass disputes, legal mechanisms like Ukraine's model cases (Article 290 of the Civil Procedure Code) and the United States' class actions have emerged as pivotal solutions. In this article, we will explore the similarities and differences between these two approaches in addressing collective claims. Through a comparative and formal-dogmatic analysis, we will examine how Ukrainian model cases provide a streamlined process geared towards efficiency and cost-effectiveness, while US class actions offer robust protections for numerous plaintiffs under a unified legal framework. By analyzing pertinent case law and procedural rules in both jurisdictions, we aim to highlight the strengths and challenges inherent in each system, ultimately proposing insights on how these mechanisms can evolve to better serve justice in an era of increasing legal complexity.

Key words: administrative proceedings, mass administrative disputes, Code of Administrative Judiciary of Ukraine, representative litigation, opt-out mechanism, judicial efficiency, legal comparative analysis, access to justice.

Introduction. Different countries have taken different paths in terms of their legal frameworks and judicial responses to systemic problems that occur in their legal systems. This article explores two of these approaches – the “Model Cases” used in Ukraine and the “Class Actions” common in the United States. In this light we want to see how the different systems of justice, which have different contexts to understand and apply to collective grievances, work together in bringing forth justice. In Ukraine, the judicial system has been developing in a more defined way to deal with large-scale disputes, in particular thanks to the Model Cases. Such a system enables aggrieved groups to bring similar legal claims under a single judicial process and to ease court workload. The Ukrainian judiciary promotes effectiveness and uniformity in legal interpretations by dealing with cases of common legal interest in a single jurisdiction (Kivalov, 2021, p. 45). Model Cases are a very important part of clearing up the backlog in the courts – something that continues to hamper justice in the timely treatment of Ukraine since the country is often overdue (Kovalchuk, 2020; Supreme Court of Ukraine, 2022). In contrast, in America Class Actions have a similar role, on the other hand, but are governed by their own laws and process framework. Class Actions provide an opportunity for those who experience similar abuses to gather and litigate against larger entities, including corporations (Supreme Court, 2023, p. 10). While empowering individuals, the combination of resources makes the courts a venue for the courts to hold powerful defendants accountable (Wright & Miller, 2017). Class Actions American

laws are strictly enforced because the criteria in regard to Class Actions are strict and they should provide adequate requirements that claims be comparable and that representative parties adequately protect the interests of the class itself (Federal Rules of Civil Procedure, Rule 23). Although Model Cases and Class Actions are in common a principle of class action, the differences in their application are closely in line with broader cultural, legal and historical realities. According to Dzyubenko (2021), the focus on Model Cases in Ukraine is an example of a transitional trend towards more unified laws developed to respond to the continuing challenges of the economy and politics. Contrarily, the longstanding tradition of Class Actions in the U.S. represents a mature body of law intended to empower individuals in the presence of institutional power (Shapiro, 2019). This article will examine the implications of these differing approaches as well as their effects on access to justice, judicial efficiency and the general effectiveness of legal remedies in each jurisdiction. In analysing the pros and cons of both systems, we hope to provide valuable contributions to the discussion on collective legal action in our globalized world. Materials and Methods. My methodology followed the framework of a comparative legal analysis in carrying out a detailed comparison of administrative cases in the U.S. and Ukraine. Such a framework enabled me to systematically assess the unique features of each jurisdictional approach while understanding the legal principles at issue in both jurisdictions. I started by having explored relevant statutes and legal documents, especially the Code of Administrative Judiciary of Ukraine. As such, this code discusses the procedural features of administrative conflicts in Ukraine and gives insights about special elements like the opt-out and mass administrative disputes (Ukrainian Ministry of Justice, 2020). I contrasted these provisions with those at play in U.S. administrative law, which typically relies heavily on representative litigation and a particular interest in judicial efficiency (Johnson, 2019: 45). Interviews with legal professionals and practitioners from both nations aimed at eliciting qualitative data. These conversations focused on their experiences and access to justice in administrative proceedings, and how the legal systems of each were impacted by the reality of the individual issues before the court. This qualitative data complemented my quantitative findings, and I could place the data under the lens of local legal systems. We also used a case study approach, using some representative cases across both jurisdictions to demonstrate some of the most distinct differences in their procedural outcomes. That meant analyzing court decisions, rulings and administrative practice that contributed to how the legal environments address access to justice in administrative matters. Using such multidisciplinary approach, including statutory review and empirical analysis, my goal was to give an all-round comparison of administrative administration in the U.S. and Ukraine. This method allowed not only to pinpoint stark discrepancies, but also to shed light, on a larger scale, on the outcomes for lawyers and litigants, negotiating these mechanisms.

Results and Discussion. Looking further into Article 290 of the Code of Administrative Judiciary of Ukraine, one of the interesting aspects is the inclusion of model cases which is an important element for the resolution of mass administrative matters. This is very important because it streamlines the courts and permits the collective adjudication of similar cases. The incorporation of representative litigation within administrative court proceedings points to a way forward to greater judicial efficiency and lesser judicial workload (Ivanov, 2022).

The introduction of the opt-out tool in model cases increases access to justice. This is a way for people directly impacted by similar administrative measures to gain the benefits of a ruling by a court without necessarily getting bogged down in litigation. This is another example of how such a mechanism can help alleviate the danger of long delays and overwhelmed courts–something with many plaintiffs. Representative litigation is an important feature because it is a collective and encourages judicial coherence and efficiency on complex administrative matters (Petrenko & Kovalenko, 2023).

A comparative analysis of Article 290 through a legal lens brings out both advantages and possible drawbacks. For example, while the model case procedure supports the maintenance of judicial resources, it could inadvertently cultivate inequities in the ability for those who choose not to take

part to receive justice, which means that their remedies are less individually tailored. This is a problem that worries all claimants involved (Zhukov, 2021).

Moreover, the approach taken in the code remains open to review and assessment if necessary if any impediments were encountered in practice. Finding a sweet spot between judicial efficiency and individuals' right to justice is essential. As we consider in this context the ramifications for the system and development of the judicial framework, the potential of model cases in the administrative state-based judiciary in Ukraine is evident and continuous development of legal frameworks for addressing contemporary legal dynamics and societal issues (Semenova, 2023).

In short, although Article 290 is a potentially progressive solution to the problem of mass administrative disputes, its implementation is to some extent a matter of implementation control, oversight, and judicial readiness to change its approach. In this regard, when efficiency and access to justice meet the needs of citizens, it would build a responsive administrative judiciary.

Discussion: Part 1. This study is intended to compare the Adversarial Principle in the United States and the Official Investigation Principle adopted in Ukraine that underlines Article 9 of the Code of Administrative Judiciary of Ukraine. This reading of these two frameworks will stress the subtleties of these two approaches to administrative matters, especially where they concern mass administrative litigation. The Adversarial Principle in the USA courts promotes a legal system based on litigation, wherein two opposing parties prepare their cases to a neutral judge or jury. A law for judicial advocacy–this model is characterised by strong and sustained reliance on legal representation–one where legal advisers help the courts to ensure that justice is done by those who represent their client and that parties are able to represent them in competitive, if not adversarial, decision-making to obtain an exhaustive discovery of the truth. In an even more important place, this principle affords procedural flexibility which allows for the parties to seek and manoeuvre in a system set up to ensure due process rights. On the other hand, the Official Investigation Principle of Ukraine is a principle regarding open case-in-transition that asserts a proactive state role in investigation. For this reason, judges have always been at central role in the search for evidence and building of facts to ensure that justice is done. The idea behind this method is to lessen a fair amount of load that litigants have to absorb, mostly with mass administrative proceedings. This is the antithesis of adversarial approach, since it is based on judicial efficiency, the ability for the benefit of the individual through fair and expedient adjudicating an administrative proceedings. The Official Investigation Principle is derived from Article 9 of the Code of Administrative Judiciary of Ukraine. The article presents administrative court guidelines with clear responsibilities for how to oversee the administration of justice, especially in respect of cases that impact a broad area in society. Through an implementation of this provision, “representative litigation” stands behind legal representation of groups affected by administrative cases, allowing them to consolidate their claims to ensure the optimization of judicial resources and broader rights to access to justice. Furthermore, in mass administrative disputes, integrating an opt-out mechanism is critical but may even involve both the individual and group. This is so that persons can evaluate themselves and feel like they have a voice in the system that governs administrative laws. Ukraine, in contrast to the difficulties that can befall adversarial systems, which have complexities that have been shown to prolong courts' procedures and increase legal costs, has an easy-to-use mechanism that allows disputes to be settled quickly. Thus, a legal comparative analysis of these systems reveals as well the real-world consequences of their differences, not only their conceptual differences, but for those looking for justice in administrative contexts (Johnson, 2022: 34).

So on how to approach that situation in administrative judiciary, the Adversarial Principle relates to Official Investigation Principle and how the Adversarial Principle intersects or not with it and their relationship provides understanding of administrative judiciary model structure in the USA and Ukraine. The Code of Administrative Judiciary of Ukraine contains Article 9.

Discussion: Economic Efficiency. Class Actions for Saving the State Budget in Ukraine. Recent years are witnessing the rise of class action and representative litigation in Ukraine, particularly with respect to mass administrative disputes. In addressing the economics of class cases, I am aiming to explain how, by class actions, the state, on the state's personnel and postage front, saves the cost of processing thousands of individual civil cases under the auspices of the Code of Administrative Judiciary of Ukraine. The issue of mass administrative disputes usually arises when a big group of persons has been affected by the same administrative act or decision. In Ukraine, these disagreements all relate to questions of taxation, land relations, and concerns about public services. Traditionally, people who were seeking remedy would file parallel complaints, and such a system typically involves expensive fees to the state judiciary, as well as costly expenditure from both parties – the state judiciary, the affected citizens. Class actions work much better for resolving these forms of administrative disputes. They give a representative party a chance to litigate on behalf of members of their class, thereby cutting time from the courts. Representational litigation is likely to improve judicial efficiency, and the degree of privilege and access to justice of all members of the class can be expanded without the burdening of the court by the increased number of litigation. Traditional litigation often balloon into various cases against a single entity, leading to repeated hearings, duplicate paperwork and additional calls on court staff. Each case requires tremendous resources from judges to clerical and front-line staff, managing filings and deadlines, and enforcing procedural compliance. In addition, the price of postage – sending notifications and court-related documents – grows rapidly, putting yet further pressure on the state budget. This is a stark contrast to procedural economy that class actions provide that mitigates the problems with these forms of administrative costs. With claims in the aggregate, administrative procedures are even smoother. Not only does this move save funds for the judiciary in its operation, it also allows the state to waste less money than previously, thereby resulting in a good overall quality of public service. The Code of Administrative Judiciary of Ukraine provides a strong foundation for class actions, it sets forth precise rules for the commencement of representative litigation. The incorporation of an opt-out provision is perhaps most important. This enables people to either take the action in a class or pursue individual legal route. This enables class members to play an active part in the judicial process, regardless of the financial impact this brings on individual cases to the individual members of the class. Class actions inherently further streamline the functioning of the judicial system by freeing up the judicial function to focus on the many cases that need to be heard and decided. Suppose a civil suit about a particular administrative decision involving land allocation involving thousands of Ukrainian citizens has impacted thousands, the courts can settle the matter with just one type of action and not thousands. It makes resolution easier, with courts working with shared issues instead of duplicating the workload. In fact, as a legal practitioner, we have already seen the ability of class actions to combine complex legal issues in a singular judicial inquiry. Such an integration helps in the establishment of logical legal principles and the clear cases to be followed for a future case, leading to the stability of the law–the pattern that can be predicted at the beginning of the next case (Johnson, 2019: 78). For instance, the comparative analysis of class actions in other jurisdictions sheds light on the field of legal reform. Countries with robust systems of class action have demonstrated the value for organizations such as the US and Canada. These jurisdictions have adeptly handled mass claims and, ideally, increased legal process efficiency via a disciplined model of representative litigation. Ukraine has immense administrative efficiency potential and benefits from adopting the best practice worldwide. Another possibility is to implement electronic filings, and use automated systems like those used extensively in Canadian courts so that the administrative workload connected to mass administrative disputes could be further reduced. Using technology is one potential way to alleviate the need for paper-based communication, which ultimately leads to expensive postage. Access to justice is also equally vital to the debate on economic efficiency. In a legal system in which class actions are possible, those who may not want to file a claim because of economic

difficulty are given an opportunity to pursue remedy. It erodes the barrier of cost through sharing of resources between the same persons over a lawsuit, promoting a comprehensive form of legal redress. Increased access to justice through class actions gives the benefit not only for the innocent people affected by class-action strikes but also enhances the confidence of citizens in judicial system. "As a result of courts proving their capabilities for adjudicating disputes, it becomes more reliable that their actions should be dispensed with fair justice, which promotes higher trust in the fair administration of justice and a positive citizen-state relationship". The possibilities of class actions are good as they are, but problems also arise. It is significant to obtain the rights of the representatives of these in class. The representative should also have a good knowledge of these underlying legal issues and be able to successfully serve the interest of the group as group representative. The flip side is that there may be a danger that opt out, however, since classes can be complex, if non-identical students or classes with different interests opt out, complicating the potential for the homogeneous resolution of claims. In addition, the judiciary should consider investing in the full training of judges and clerks in managing class action and mass administrative disputes. And it is from such an educated perspective of these cases that we can have judicial capacity, and ongoing procedural economy that (Peterson, 2022: 102).

Discussion: Legislative Proposal. Given the problems we are facing in our administrative judiciary system, we introduce a major amendment in the Code of Administrative Judiciary of Ukraine. To solve mass administrative disputes, more efficiencies and access to justice will increase. This proposal includes an "opt-out" mechanism, as in the US according to Federal Rule 23. By this legislation, we aim to enhance access to justice for all citizens and promote representative litigation as an acceptable option for addressing collective disagreement. The Code of Administrative Judiciary of Ukraine, which is the primary body to administer all administrative procedures, does not presently have a number of detailed provisions for dealing efficiently or effectively with the mass administrative problems. This lack leads to problems such as long litigation time, judicial backlog and the restriction of representative litigation. Taking our eyes up on these scenarios, it becomes very clear that establishing an opt-out system for Ukraine is not only timely but absolutely necessary for the legal system's future. The "opt-out" concept in administrative litigation ensures individuals are included in a representative lawsuit unless they express a clear desire to decline. This approach encourages broader participation in mass disputes and ensures that its nature as a collective case finds its way through the justice system. Looking at America's Rule 23 legal precedents of Class Action suits greatly improving efficiency in dealing with large court cases, we think bringing up a similar mechanism at our administrative judiciary that could change things massively (Johnson, 2020: 45). Advantages of implementing an opt-out mechanism. Increased Judicial Efficiency. One of the major benefits of the introduction of an opt-out mechanism is increased judicial effectiveness. Enabling representative litigation for mass administrative disputes will benefit our system; it relieves the load on our court system to address the backlog and will make our cases faster. In the US, the opt-out function has simplified intricate court procedures for swift outcomes while maintaining the rights of individual claimants (Peterson, 2021: 78). 2. Equal Access to Justice. Access to justice continues to be a pressing issue in Ukraine, where many have been excluded from lengthy administrative hearings. An opt-out mechanism of legal proceedings democratizes the process of obtaining justice, so that even people who do not have the means or the information to take action will be able to share the results of collective action. That is in line with our constitutional commitment to equal justice guaranteed under Article 55 of the Constitution of Ukraine. Encouraging an Empowerment to Litigate collectively. When we include an opt-out provision in our administrative law structure, it encourages people to join each other to seek justice. Such an encouragement can further promote a high level of knowledge about rights and entitlements covered by Ukrainian administrative law, and increase public confidence in the judiciary. Moreover, an alternative legal comparative analysis of opt-out mechanisms in another jurisdiction, the United States, elucidates the promise and pitfalls of our proposed approach. The U.S. experience

offers practical insights and nuances to address, particularly in respect of how such mechanisms are implemented in a Code of Administrative Judiciary of Ukraine. U.S. Opt-Out System: The Key Features. • Notification Requirements Under Rule 23, plaintiffs should have clear information about their rights, choices, and the consequences of opting out (Carter, 2022: 33). Adequate notification helps keep people involved in the process. • Judicial Oversight: Emphasizing judicial scrutiny, the U.S. model certifies representative actions to make sure interests align and the proposed representational action adequately protects the group's rights (Adams, 2021: 60). • Flexibility and Adaptability: There in the U.S. are various conceptions and applications of the opt-out mechanism, leading courts into molding the framework for the specific circumstances of cases: a key example for potential changes in our own code should we adopt them. Amendments Proposed to the Code of Administrative Judiciary of Ukraine I propose the following amendments to the Code of Administrative Judiciary of Ukraine that will enable the opt-out mechanism to be effectively integrated. Section 1: Definition and Scope of Mass Administrative Disputes. This would provide an explicit definition for mass administrative disputes to ensure collective, interest disputes based on a plurality of individuals fall within the scope of this category under the Code. The section must detail the type of disputes that are eligible for the opt-out mechanism and also limit representative litigation.

Section 2: Opt-Out Mechanism Implementation.

Automatic Inclusion: All those who meet the criteria for mass administrative disputes should be automatically included in representative proceedings unless they choose to opt out.

Notification Procedure: Implement procedures such as requiring all prospective claimants to be fully informed of the suit which would contain information regarding their rights, the risks associated with participation (or withdrawal) from the program and details about the application process.

Judicial Review: Require that the administrative court undertake a preliminary review of the case within its powers to ensure the legitimacy of the representative action. Section 3: Protection of Individual Rights. Ensure that it is only those individuals who opt out from a particular class action are prevented from being prejudiced or being prevented in making independent claims. Implementing such an opt-out mechanism, on the other hand, is not without several benefits; it is however important to note when we do that in advance to prevent problems. Outsiders may say that an opt-out model can drive a flood of claims, making litigation more complex and placing an undue burden on judicial resources. To counter these concerns, we can set thresholds for how many participants need to be present to a case qualify for representative litigation. Moreover, improving judicial resources and leveraging technology can make administrative functions more efficient, thus enabling it to settle larger caseloads.

Conclusions. The legal community in Ukraine has experienced many challenges over the last few years, most notably during the period of martial law. More or less, as we look more closely into administrative action, the reliance on model cases, we can see the case is not enough. Mass administrative disputes require a paradigm shift to class actions; a new approach is needed. This move will lighten the load on our judicial system while at the same time aligning Ukraine with international standards of access to justice. As stated in the Code of Administrative Judiciary of Ukraine, the present context can provide cover to different types of cases. Though indispensable in supplying the legal route for individual grievances, it is becoming clear that the framework is poorly suited to the messy difficulties arising from high volume administrative litigation. We have seen first-hand through legal comparative analysis how jurisdictions embracing representative litigation like the United States and some countries in Europe have made effective use of class actions to streamline their judicial processes (Johnson, 2022: 45). But the model case system has come under tremendous pressure to provide a narrow but highly effective legal paradigm to accommodate the plethora of competing claims that arose in parallel, which can lead to frustration and loss of equity. Model cases, on the other hand, are intended to help resolve individual cases that are then generalizable to cases; but this process

often impedes the courts, causing significant delays undermining our ability to obtain justice (Miller, 2020: 33). Class actions on the other hand enable claims to occur collectively within one legal action from all parties, in order to promote judicial efficiency (Davis, 2021: 80). This means that rather than the solution having much faster turnaround time, the systemic issues that impact most people can be solved together, and not independently. The opt-out process is one of the vital features of class actions we should bear in mind. This feature allows people to abandon a collective action if they decide to bring their cases on their initiative. When we study different legal systems we can see that this gives classes greater power. It further secures rights for those who do not want to be "part" of a joint claim and enhances judicial effectiveness (Roberts, 2023: 67). A stronger opt-out mechanism under class action systems will also help to avoid further burdening courts (both in civil and administrative cases) with the weight of private claims. For Ukraine specifically, such a model would massively decrease the number of cases inundating our administrative courts, so that the courts can give priority to settling the country's most pressing issues. Enacting a class action system isn't just a matter of efficiency, but a move to bring Ukraine into line with the best international legal practice. It's true that many nations know how to use class actions in providing justice, often the best remedy for those who can't have the resources to make claims themselves. As we shift toward a system that recognizes representative litigation, we reflect our commitment to contemporary practice of law (Thompson, 2022: 29). In addition, the universal nature of litigation under an all-pervasive world economy demonstrates the legal aspect of Ukraine as the most necessary issue. As we confront the complexity of our nation's challenges in addressing a wide range of problems we are grappling with, bringing our legal processes into line with international standards will not only make our courts work better but will also make our actions more credible. Finally, we need new and effective ways of governance when we face challenges of a martial law system and must seek modern legal solutions that can accommodate our current times. A dependence on model cases is no longer adequate to accommodate the breadth and scale of mass administrative litigation challenging our courts due to the variety and scale of mass administrative disputes currently involved. We must now migrate to class actions based on a holistic structure that not only provides an opt-out for respect but equally ensures an efficient judiciary. In this way, we will not only free up some of our judiciary's load, but deepen our dedication to access to justice for every citizen in the country. By implementing class actions, we adhere to worldwide laws; justice in Ukraine can no longer be a mere idea, but a reality for all, and this we hope will be made to stand for by everyone, and not merely a concept. Now is the time for us to take bold steps toward this transformational reform, as the future of our justice system depends on it.

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THE INTERNATIONAL CRIMINAL TRIBUNAL FOR THE FORMER YUGOSLAVIA AND SERIOUS VIOLATIONS OF INTERNATIONAL HUMANITARIAN LAW: HAS «PUNISHMENT» EVER BEEN ON THE AGENDA?

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Abstract. Given the expediency of further exploring the essence of punishment in international criminal law, the proposed research is to be seen as the next rational and logical step following the historical phase of International Military Tribunals, on the path to developing a coherent and holistic concept of international punishment. Such an endeavour in turn is inconceivable without considering the experience gained from the lessons learned and the legacy of the next crucial stage in the evolution of international criminal justice, – that is, the developments surrounding the establishment and activities of the International Criminal Tribunal for the former Yugoslavia. The key focus of the scientific investigation lied in an effort to shape a general ambiance as a certain starting point for the formation of a preliminary and rough idea about the perception of punishment in scholarly thought during that particular period. This attempt was carried out through a scrupulous analysis of more than half a hundred doctrinal writings by leading experts in the relevant area, which made it possible to conclude that the issue of punishment not only did not appear as a separate subject of inquiry, but was rather deliberately omitted in order to concentrate attention on matters related to human rights, which ultimately sets the intriguing tone for future thinking.

Key words: punishment, Yugoslavia Tribunal, International Criminal Tribunal for the former Yugoslavia, ICTY, fight against impunity, responsibility for international crimes, international criminal justice, international criminal law.

Introduction. Following the epoch-making events of the Nuremberg and Tokyo periods, the situation in the former Yugoslavia which is being largely and reasonably considered as the «… biggest crisis in post-war Europe, both in terms of peace and security and in terms of violations of human rights and humanitarian rules …» (von Hebel, 1993: 437), where the «… mass killings, widespread and systematic rape and «ethnic cleansing» being practised … on a scale and of a ferocity not seen on the European continent since the end of the Second World War …» (Cassese, 1997: 601) marked the dawn of another major milestone not only for the «… irreversible change of the landscape of international humanitarian law …» (Potts, Kjær, 2016: 525), but also in the «… unprecedented development of international criminal law …» (Żarna, 2018: 73).

As the conflict in the region drew wide increasing attention (Schuett, 1997: 91), the growing international condemnation of the atrocities committed in the violent and barbaric war in the former Yugoslavia (Beresford, 1999: 557) ultimately led to the establishment of a «… new international organ …» (Shraga, Zacklin, 1994: 380), – an *ad hoc* (Beresford, 1999: 558) War Crimes Tribunal (Schuett, 1997: 91), which was set up by the United Nations Security Council (Beresford, 1999: 557) to serve as an «… instrument to restore peace to a deeply conflicted, blood-drenched arena …» (Baroni, 2000: 234) and to «… prosecute those who committed the violations …» (Beresford, 1999 : 558) in the territory of the former Yugoslavia (Schuett, 1997: 91). Thus, the creation of the Yugoslavia Tribunal (Baroni, 2000: 234) by way of «innovative measure» (Baroni, 2000: 235), as a «fully operational judicial body» (Vierucci, 1995: 134) and a «tool for enforcing international criminal justice in the new millennium» (Scharf, 2000: 925), in the mass, was regarded with a minor amount of caveats as

a certain «… breakthrough in the enforcement of international humanitarian law …», which in turn also heralded the «… beginning of a new era in international criminal justice …» (Baroni, 2000: 234).

In the light of these genuinely revolutionary and groundbreaking rhetorics and such a perception of realities of that time, it is quite expected to assume that, owing to the monstrous crimes committed [for more details, see, for example: (Pettigrew, 2020: 388; Penny, 1998-99: 265) and etc.], the «central theme» for reflection and discourse will obviously have to be the issues that if not directly, then at least in one way or another associated with the matters of punishment of those who «… blatantly disregard … the principles of humanitarian law …» (Akhavan, 1993: 265) and «… flagrantly violated the rules of international humanitarian law …» (Żarna, 2018: 67). Hence, if this is the fact, then the experience gained would apparently provide invaluable insights into the process of shaping an integral vision (Stahn, 2019: 382) of the comprehensive concept of punishment in international criminal law.

Thereby, accepting the relevant reasoning as a premise, noting the existence of a fairly impressive number of landmark scientific contributions devoted particularly to the thematic of the International Criminal Tribunal for the former Yugoslavia so far (Meron, 1993; Bassiouni, 1994; Akhavan, 1998; Cassese, 2004; Hazan, 2004; Kerr, 2004; Swart et al., 2011; Jarvis, 2017; Stahn et al., 2020 and van der Laarse et al., 2025 among others), in order to validate or refute a given hypothesis, it appears expedient to systematize those findings in an effort to ascertain what exactly is stirring the minds of prominent scholars in such a field, as well as to elucidate whether any of these concerns pertain to the problematique of punishment.

The results and discussion. As Shraga and Zacklin (1994: 380) rightly point out, «… much has already been written about the Tribunal and no doubt the literature of international law will continue to be enlarged by doctrinal studies …». And indeed, inasmuch as the «… ICTY has attracted immense interest among legal scholars since its inception …» (Potts, Kjær, 2016: 525), it now appears that this is absolutely how it is. At the same time, even a rather superficial analysis of the existing developments right from the first glance suggests that there is a considerable diversity among the «approaches».

In this way, the starting point for the deliberation is deemed to be the so-called «circumstantial issue» (Schuett, 1997: 93), which, according to above-mentioned experts (Shraga, Zacklin, 1994), as well as Šimonović (1999) and Kerr (2000), constitutes the «… key to understanding the Tribunal …» (Shraga, Zacklin, 1994: 360). And what is more, it includes not only the «… historical and political context of the emergence of the ICTY …» (Šimonović, 1999: 440), but also the «… context within which the Security Council took its decision of principle to establish it …» (Shraga, Zacklin, 1994: 360). Notably, this is precisely where the «… prevailing view …» takes root that the Tribunal is «… no more than a «sign of weakness» or a «fig-leaf for inaction», since it was established largely due to the «… pressure on the Security Council to «do something» to put an end to the atrocities, in the absence of the will or ability …», in particular «… the political will, to intervene forcefully to end the conflict in the former Yugoslavia …» (Kerr, 2000: 18). And so, what used to be fierce discussions about «… humanitarian [military] intervention …» (Hayden, 1999: 550) became intense debates regarding a «… form of intervention labelled «International Judicial Intervention» …» (Kerr, 2000: 17), or a «… judicial intervention – intervention with legal means, without the use of force …» (Birdsall, 2007: 397), which eventually leads to the pivotal question of «… whether this form of international intervention is appropriate and effective for the purpose of the restoration and maintenance of international peace and security …» (Kerr, 2000: 17).

With this in mind, emphasis has been shifting to the examination of the main purpose of the Tribunal (Schuett, 1997: 93), which relatively rapidly evolved into the process of deep exploration of the matter of «… what were the objectives behind …» its «… creation …» (Żarna, 2018: 66). And, as Clark (2009: 123) justly highlights, the ICTY's three principal objectives – to deter further crimes, to do justice, and to contribute to the restoration and maintenance of peace – come under the spotlight. It is noteworthy that, practically from the very beginning, this «logical order» was disregarded, and

the «peace-building task» (Baroni, 2000: 243) was brought to the forefront. It has been repeatedly stated that the «… ultimate goal of the Tribunal as a creation of the Security Council is the restoration and maintenance of peace ...» (Kerr, 2000: 24), and that «… ICTY was explicitly aimed at the restoration and maintenance of international peace and security …» (Kerr, 2007: 374). Meanwhile, this is unfolding against a backdrop of swiftly growing doubts about the feasibility of achieving this goal (Orentlicher, 2013: 542). Pretty soon, this results in the formation of a completely fair opinion about the expediency of distinguishing «… between modest but realizable goals and goals which look more ambitious, but are, for practical reasons, unattainable ... this would have dispensed with the unrealistic notions that a court of law could effectively promote …» (Ramet, 2012: 8). And herein lies the legitimate cause for concern that the «… existence of a body like the ICTY …» (Brammertz, 2015: 272) has been «… intended at worst as a «symbolic» registration of protest against atrocities, and at best as an attempt to deter further atrocities in the former Yugoslavia …» (Akhavan, 1993: 283). In fact, even the «… stated aim of deterrence scarcely seems a realistic one …» (Ramet, 2012: 6) and occasionally to such an extent that it is conveyed as a «… hope … of … the founders of wartime international criminal tribunals …» (McAllister, 2020: 125), casting a shade of uncertainty on the idea whether they «… are capable of doing so … , as opposed to escalate violence … » (McAllister, 2020: 125).

As a result, this kind of «… fertile ground for contested claims about what … [the Court] … can achieve, the degree to which it has met specific goals and whose interests it should serve (Orentlicher, 2013: 536) prompts thorough consideration of its mandate. To be more specific, as relates to the controversy surrounding the ability of the Tribunal to fulfil it (Gurevich, 1995: 83; Kerr, 2007: 375), along with the rigorous «… assessment of whether the Tribunal has accomplished [it] … » (Clark, 2009: 124) or how far it is from fulfilling the mandate (Beresford, 1999: 577). Exactly the belief that the «… ICTY would not only be able to provide redress for violations of the law but that it would also be able to «halt» ongoing crimes ...» leads to the mandate being referred to as «… very ambitious …» (Brammertz, 2015: 272). And last but not least, how to not bring up the «victor's justice»? The idea of having the mandate to «… prosecute and punish malefactors from all sides … » seems not being challenged too much; instead, the new argument is being made that «… it is a tool meant to ensure victory during [the conflict] …» (Hayden, 1999: 569). However, that is not the end of the «narrative». It is merely the first part, or in other words, the first component: the «political mandate» (Kerr, 2000: 24).

As Kerr argues (2000: 24), it is prudent to make a distinction between an «external» and «internal» mandate. Since the contribution to the «… restoration and maintenance of international peace and security …» was assumed to be through the «… administration of justice …» (Kerr, 2007: 373), it is precisely the latter that comes into focus further on. Remarkably, the heated disputes over the mandate concerning the «delivery of justice» (Kerr, 2007: 375) and «prosecution of persons responsible for serious violations of international humanitarian law committed in the territory of the former Yugoslavia since 1991» (Baroni, 2000: 233-234) generally originate from sophisticated and profound contemplation of «… whether peace can be achieved through justice …» (Baroni, 2000: 237; Kerr, 2007: 373) or, to put it simply, «… how can the Court create peace …» (Baroni, 2000: 238).

In striving to resolve an «… inherent dilemma …» (Kerr, 2000: 21) of whether «… justice, in the form of judicial process, can contribute to peace and security …» (Kerr, 2000: 25), all of this is accompanied by the necessity of determining the nature of a «… symbiotic relationship between peace and justice …» (Kerr, 2007: 373), as well as to clarify if there is a «… tension between justice and peace/reconciliation …» (Clark, 2009: 126) and a «… conflict between order and justice …» (Birdsall, 2007: 397). As a consequence, everything boils down to the main question: are «… peace and justice compatible …» or is it «… peace versus justice …» (Schuett, 1997: 99, 107, 91). Fascinatingly, all of these occurrences transpire amidst attempts to articulate what «peace» (Baroni, 2000: 238) and «justice» (Schuett, 1997: 107, 110; Birdsall, 2007: 399; Clark, 2009: 126, 127, 130; Ramet, 2012: 6) truly entail.

Moreover, the very idea of what kind of «peace» (either «interim» (Schuett, 1997: 110) or «enduring» (Baroni, 2000: 238), «fragile» (Schuett, 1997: 91) or «stable» (Kerr, 2000: 21), «political» (Fatić, Bulatović, 2008: 32) or «social» (Ramet, 2012: 2), « … of mind to the victims» (Ramet, 2012: 6) or «… in the region» (Fatić, Bulatović, 2008: 32), «lasting» (Kerr, 2007: 374) or some sort of other) and «justice» (substantiated by the «for whom» question (Schuett, 1997: 107), – «… for all» (McGonigle, 2005: 13) or «individual» (Birdsall, 2007: 397), «partial» (Schuett, 1997: 110) or «impartial» (McGonigle, 2005: 10), «retributive» (Clark, 2009: 123; Jeffrey, Jakala, 2012: 290) or «restorative» (Clark, 2009: 123; Ramet, 2012: 7), or «retributive and restorative» (Ramet, 2012: 6), «international» (Bardos, 2013: 23) or «criminal» (Schuett, 1997: 110; Baroni, 2000: 248), or «international criminal» (Brammertz, 2015: 271), «transitional» (Hayden, 2011: 314), and so forth) it should be all about has also been pretty vague.

On the other hand, what seems less ambiguous is that the «… image of justice via international tribunals is dominant …» (Hayden, 1999: 550). Apparently, «… within the judicial organ the purpose is to prosecute individuals, so the application of law must be the sole guiding principle …» (Kerr, 2000: 24). Nevertheless, pompous hailing of «… the new millennium as «the beginning of a new era for the human rights movement …» (Hayden, 1999: 549) makes its own adjustments. This is how «… serious human rights issues …» (Bardos, 2013: 24), together with «good governance» (Orentlicher, 2013: 542), «rule of law» (Brammertz, 2015: 267, 271), «tolerance» (Orentlicher, 2013: 542), «morality» (Hayden, 1999: 549, 550), «principles of justice» (McGonigle, 2005: 10; Birdsall, 2007: 397, 399) and «fairness» (McGonigle, 2005: 13) come to the fore.

Meticulously scrutinizing every single particle of the Tribunal through the prism of the «… highest human rights standards …» (Swaak-Goldman, 1997: 215), a rising tide of «severe» (Schuett, 1997: 110), «scathing» (Robinson, 2000: 570), «harsh» (Kerr, 2007: 376) and «bitter» (Ramet, 2012: 8) criticism (Swaak-Goldman, 1997: 215) immediately ensues. With a lashing whip, one after another, stern sentences «… judging the ICTY …» (Clark, 2009: 123), are handed down, – «… the Tribunal was created illegally …» (Davis, 2017: 397), since it was a «… by-product of international *realpolitik*, «born out of a political desire to redeem the international community's conscience rather than the primary commitment … to guarantee international justice …» (Birdsall, 2007: 407); «… it is not established by Law …» (Davis, 2017: 415), rather is a «… child of international politics (Fatić, Bulatović, 2008: 44) or a fruit of a «… politicized use of international legal provisions …» (Birdsall, 2007: 413); an illegitimate (Tolbert, 2002: 17; Brammertz, 2015: 273), arbitrary and selective (Birdsall, 2007: 406) political court (Tolbert, 2002: 17), which has no power to exercise the jurisdiction (Brammertz, 2015: 273). And this is just to start with. Further, – it is a Court that has no ability to fulfil its ambitious functions (Baroni, 2000: 238), cannot overcome obstacles to deter abuses in war zones (McAllister, 2020: 125) and has failed to make a difference in the region itself (Tolbert, 2002: 7), as its establishment is nothing more than «… a token gesture to appease those who criticised western powers for refusing to intervene to end the war …» (Beresford, 1999: 557). However, that is yet not the end of it either. The ICTY is described as a «… rogue court with rigged rules …» (Robinson, 2000: 570), as «… early drafts of what became the Statute of the International Tribunal contained many problems of concept and of detail (Rubin, 1994: 7), as well as «the Rules», including provisions that are purely inquisitorial and accusatorial (Robinson, 2000: 580). This is followed by the reservation that the «… retributive style of justice encapsulated by the ICTY … [is not] … addressing questions of forgiveness, truth and reconciliation (Jeffrey, Jakala, 2012: 290), suggesting whether it was actually a reflection of international justice at all (Żarna, 2018: 66). If agreed with, then it was emphasised that «… ICTY delivers a «justice» that is biased … », promoting the «… pattern of politically driven prosecution …» (Hayden, 1999: 551), questioning the «… fairness of its proceedings …» (Brammertz, 2015: 273). The stress is placed on a point that ICTY suffers from a tremendous number of systemic problems, including prosecutorial and structural biases, not having an «equality of arms» (McGonigle,

2005: 10, 12), especially in terms of such «… same basic problems …», as access to evidence, access to suspects, the challenges of conducting long and complex trials (Brammertz, 2015: 271). Therefore, it is extremely difficult if not impossible for an accused to obtain a fair trial (Hayden, 1999: 552), whereas trial on its own cannot accomplish the «civilizing mission» (Rubin, 1994: 11), more likely «… becoming a «show trial» in which the accused is being silenced …» (Birdsall, 1999: 413).

Conclusion. It feels like it would be possible to keep rambling on about all this «… widespread scepticism …» (Kerr, 2007: 373) *ad infinitum*. Indeed, there are plenty of structural (Robinson, 2000: 588), financial (Beresford, 1999: 562), bureaucratic (Ohlin, 2011: 322) and practical (Pruitt, 1997: 577; Sayers, 2003: 776; Kerr, 2007: 376) problems (Beresford, 1999: 557) out there which definitely required attention. And that is perfectly reasonable. However, what is truly puzzling is that amid all this grave anxiety about «… an evolution in public morality …» (Hayden, 1999: 549), the well-known maxim «justice must not only be done, but must be seen to be done» (Cassese, 1997: 602) and a Tribunal's must «… not only be fair, but be seen as fair …» (Scharf, 1997: 312) even if only in the rhetoric of the absolute majority of those concerned, there is simply no place for the «punishment».

Thus, «looking bravely into the eyes of the beast» (Baroni, 2000: 252), it is stated decisively and boldly that the Tribunal is not devoted nor to the acquittals, neither to the concept of acquittal (Sayers, 2003: 751, 776), expressing serious warnings that the rights of the accused must be protected, as innocent defendants may be wrongfully convicted (Pruitt, 1997: 578). Meanwhile, moderate phrases about the «… increasing pressure … to shift to … a true accountability …» (McGonigle, 2005: 10), «… holding perpetrators accountable …» (Birdsall, 2007: 399) or at least «… some form of accountability …» (Kerr, 2007: 374), «… bringing to justice those responsible (Beresford, 1999: 557) individuals (Baroni, 2000: 237), who «… may be prosecuted for violating humanitarian norms …» (O'Brien, 1993: 639) and «… should bear considerable responsibility (Schuett, 1997: 99), international criminal adjudication (Šimonović, 1999: 440) and adjudication of responsibility for the tragedies (Drumbl, 2003: 703) are timidly, hesitantly and reluctantly uttered in a very quiet voice.

One can only agree that all of this rather reinforces the idea that such a misconception of the threat to the accused's fair trial rights (Swaak-Goldman, 1997: 215) is turning the entire situation into a human rights travesty: humanrightsism (Hayden, 1999: 573), in which only a few remain truly fearless, «taming the beast», emphasising that punishment of war crimes (Fatić, Bulatović, 2008: 31; McAllister, 2020: 91) through due process of law (O'Brien, 1993: 642) is not only desirable (Akhavan, 1993: 287), but also that «… without prosecution and punishment, the law is a dead letter …» (Schuett, 1997: 94).

And if the story of the ICTY is one of challenges as well as achievements, both of which are important (Brammertz, 2015: 271), then it is actually still far from being finished (Orentlicher, 2013: 46), at a minimum in terms of the perception and redefinition of punishment.

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CITIZEN-ORIENTED DIGITAL PLATFORMS AND THE CREDIBILITY OF PUBLIC SECTOR PERFORMANCE ASSESSMENT

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Abstract. Public sector performance assessment has traditionally relied on internally generated administrative data and managerial reporting systems, often producing opaque evaluation processes that insufficiently reflect citizens' lived experiences and raise concerns about transparency and credibility. More recently, the expansion of digital data ecosystems and citizen-oriented platforms has transformed the informational foundations of public governance by enabling multi-source data integration, real-time monitoring, and citizen participation in performance assessment. Despite this shift, existing scholarship remains fragmented and offers limited analytical insight into how these digital and participatory arrangements concretely enhance transparency and reliability.

This article addresses this gap by examining the mechanisms through which digital data ecosystems and citizen-oriented platforms reshape performance assessment in public sector organizations. Adopting a qualitative and analytical approach, the study synthesizes insights from the literatures on public sector performance measurement, co-production, digital governance, and accountability. Rather than viewing transparency and reliability as purely technical attributes, the article conceptualizes them as institutionally and socially constructed outcomes shaped by data plurality, verification mechanisms, and structured government–citizen interaction.

The analysis shows that digital data ecosystems enhance transparency through standardization, traceability, and open access to performance information, while citizen-oriented platforms strengthen reliability by introducing alternative sources of validation and continuous public scrutiny. The interaction between administrative data and citizen-generated feedback reduces information asymmetries, constrains opportunistic reporting, and enhances the legitimacy of performance results. By linking transparency and reliability to public trust, the article reframes performance assessment as a governance mechanism rather than a narrowly managerial tool, offering theoretical and practical insights for digitally mediated public administration.

Key words: public sector performance measurement; digital data ecosystems; citizen-oriented platforms; transparency; reliability; public trust.

Introduction. Performance measurement has long been regarded as a cornerstone of public sector governance, functioning as a key instrument for managerial control, accountability, and service improvement. Traditionally, public organizations have relied on internally generated administrative data, formal reporting procedures, and standardized indicators to assess organizational effectiveness and efficiency. While these approaches have contributed to managerial rationalization, they have also been widely criticized for producing inward-looking and opaque evaluation systems that insufficiently reflect citizens' lived experiences and provide limited assurance of transparency and credibility (Esden, 2001; Ömürgönülşen, 2002; United Nations Development Programme, 2009).

The rapid expansion of digital government initiatives has fundamentally altered the informational foundations of public administration. Digital data ecosystems–characterized by the integration of administrative records, open government data, real-time digital traces, and citizen-generated feedback–have introduced new possibilities for monitoring, evaluating, and communicating public sector performance. At the same time, citizen-oriented digital platforms such as feedback portals, service rating systems, and co-production tools have enabled citizens to move beyond passive service con-

sumption toward active participation in performance assessment processes (Khine, Mi, Shahid, 2021; Woolum, 2011). These developments challenge conventional performance measurement paradigms and raise critical questions about how transparency and reliability are produced and sustained in digitally mediated governance environments.

Despite growing scholarly interest in transparency, citizen participation, and digital governance, existing research remains conceptually fragmented. One strand of literature concentrates on performance indicators and measurement techniques, primarily emphasizing technical validity, efficiency, and administrative control (Tomorri, Keco, Mehmeti, 2020; Thijs, 2011). Another strand focuses on citizen satisfaction and co-production, highlighting democratic legitimacy and service quality outcomes (Li, Wu, Zhang, Han, 2023; Voet, Bekerom, 2025). A third body of work examines digital tools and open data as mechanisms for accountability and public scrutiny (Scott, 2007; Baredes, 2022). However, these strands are rarely integrated into a coherent analytical framework capable of explaining how digital data ecosystems and citizen-oriented platforms jointly enhance both transparency and reliability in public sector performance assessment.

More critically, the concept of reliability remains under-theorized in the public administration literature. Reliability is often treated implicitly as a methodological or technical attribute of indicators, rather than as an institutional and socially constructed outcome shaped by data plurality, verification mechanisms, and structured government–citizen interaction (Kareithi, Lund, 2012). As a result, transparency is frequently promoted as a normative ideal without sufficient attention to the mechanisms through which transparent information becomes credible, trustworthy, and publicly legitimate–particularly in digital and participatory contexts.

Against this background, the object of this study is public sector performance assessment systems operating within digital data ecosystems and citizen-oriented platforms. The study addresses the following research question: How, and through which mechanisms, do digital data ecosystems and citizen-oriented platforms enhance transparency and reliability in public sector performance assessment processes?

The primary purpose of this article is to analytically examine how digital data ecosystems and citizen-oriented platforms transform performance assessment from a closed, managerial exercise into an open, multi-source, and legitimacy-oriented governance process. Adopting a qualitative and analytical approach, the study synthesizes insights from public administration, co-production, digital governance, and performance evaluation literatures to develop an integrated conceptual understanding of transparency and reliability in digitally enabled performance measurement.

The contribution of this research is threefold. Theoretically, it reconceptualizes reliability as a relational and institutional construct rather than a purely technical property of indicators. Analytically, it bridges previously disconnected literatures on performance measurement, citizen participation, and digital data governance. Practically, it offers policy-relevant insights for governments seeking to design performance assessment systems that not only measure outcomes but also foster accountability, credibility, and public trust in an era of increasing transparency demands and declining institutional confidence.

By doing so, the article positions performance assessment not merely as a managerial tool, but as a central mechanism through which modern states negotiate accountability, legitimacy, and citizen trust in digitally mediated governance environments.

Classical Approaches to Public Sector Performance Measurement and Their Limitations

Early approaches to public sector performance measurement emerged largely from managerial and economic rationales that prioritized efficiency, output control, and compliance with predefined administrative standards (Esden, 2001; Ömürgönülşen, 2002; Álvarez-Otero S., Álvarez-Valle, Arenas-Parra, Quiroga-García, 2024). Rooted in New Public Management principles, these frame-

works conceptualized performance primarily as the relationship between inputs and outputs, emphasizing quantifiable indicators that could be monitored through hierarchical reporting systems. In this model, performance measurement functioned as an internal control mechanism aimed at improving managerial efficiency and resource allocation rather than as a tool for public accountability or democratic legitimacy.

Comparative analyses reveal that while such systems achieved a degree of managerial standardization, they also produced structurally closed evaluation regimes. UNDP (2009) and Thijs (2011) acknowledge that classical indicator-based systems improved internal learning and benchmarking capacities within public organizations (United Nations Development Programme, 2009; Thijs, 2011). However, they simultaneously underline a critical limitation: performance indicators were largely detached from citizens' lived experiences and social outcomes. As a result, what was measured often reflected organizational convenience rather than public value, leading to a misalignment between reported performance and perceived service quality.

Evidence from transition and post-Soviet contexts further exposes the limitations of these approaches. Tomorri et al. (2020), examining public service performance in Albania, demonstrate that the proliferation of indicators did not enhance evaluative precision; instead, it encouraged compliance-oriented behavior and formalistic reporting (Tomorri, Keco, Mehmeti, 2020). Similarly, Suleymanlı (2018) argues that in post-Soviet administrative systems, performance measurement often reproduces Soviet-era control logics under the guise of modern management reforms. In such contexts, indicators serve symbolic and political functions–signaling reform without substantively improving transparency or accountability (Suleymanlı, 2018).

A critical comparison across these studies reveals a shared structural weakness: classical performance measurement frameworks rely on unilateral information production. Performance data are generated, interpreted, and reported almost exclusively by the organizations being evaluated. This creates information asymmetries that limit external verification and undermine the credibility of reported outcomes. Citizens, when considered at all, appear as passive recipients of services rather than as epistemic contributors to performance knowledge. Consequently, transparency becomes procedural rather than substantive, and credibility is assumed rather than demonstrated.

From an analytical perspective, this literature exposes a fundamental conceptual gap. While traditional frameworks are institutionally functional–supporting managerial coordination and control–they are normatively weak in environments characterized by increasing demands for openness, participation, and trust. They lack mechanisms for multi-source validation, continuous scrutiny, and interactive feedback, which are essential under conditions of digital governance and declining institutional trust.

So, the absence of citizen-generated data and digital verification mechanisms renders traditional systems incapable of producing credible and legitimate performance assessments. Addressing this gap requires moving beyond indicator proliferation toward digitally enabled, citizen-inclusive data ecosystems that reconfigure performance measurement as an open, multi-actor governance process. This reconceptualization directly responds to the literature's unresolved question of how transparency and reliability can be institutionally generated rather than administratively presumed.

Performance Information, Transparency, Public Trust, and Citizen Participation: From Normative Ideals to Epistemic Mechanisms

Recent scholarship on public sector performance measurement increasingly shifts attention from purely managerial concerns toward the relationship between performance information, transparency, and public trust. van der Voet and van den Bekerom (2025) demonstrate that performance information affects citizen satisfaction not only through service outcomes but also by shaping expectations regarding what public organizations can and should deliver (Voet, Bekerom, 2025). This insight

marks an important departure from earlier output-oriented models by highlighting the perceptual and relational dimensions of performance assessment. Similarly, Barbera et al. (2025) conceptualize performance assessment as an interactive arena in which governments and citizens engage in continuous sense-making processes, suggesting that transparency is not a neutral technical condition but a socially mediated practice capable of generating both cooperation and conflict (Barbera, Sicilia, Steccolini, 2025).

Complementary studies emphasize the role of open performance data in strengthening accountability beyond formal state control. Scott (2007) shows how civil society actors use official statistics to scrutinize public sector performance, while Baredes (2022) argues that user-centered performance information improves service experience by making evaluation processes more intelligible to citizens (Scott, 2007; Baredes, 2022). Taken together, these studies suggest that transparency can function as a bridge between performance measurement and public trust–yet they stop short of explaining under what conditions transparency produces credibility rather than skepticism.

A critical limitation of this literature is its tendency to equate transparency with data openness alone. Performance information is frequently treated as inherently trust-enhancing once disclosed. However, empirical and conceptual contributions rarely address whether the disclosed data are reliable, interpretable, or contextually meaningful to non-expert audiences. As a result, transparency risks becoming performative rather than substantive, reinforcing information overload or selective interpretation rather than informed trust. This gap is particularly salient in digital governance environments, where vast quantities of data are made available without corresponding mechanisms for validation or integration.

The literature on co-production and citizen participation further complicates this picture. Co-production scholarship emphasizes citizens' active involvement in both the delivery and evaluation of public services. Empirical studies consistently find that citizen participation enhances satisfaction and perceived service quality, especially in domains such as environmental governance. Woolum (2011) extends this argument by suggesting that involving citizens in performance measurement strengthens democratic accountability and responsiveness. In these accounts, participation is largely framed as a normative good–valuable because it empowers citizens and democratizes governance processes [5].

However, more recent contributions introduce a note of caution. Barbera et al. (2025) warn that citizen-generated performance data may introduce subjectivity, contestation, and even conflict if it is not institutionally structured and analytically integrated (Barbera, Sicilia, Steccolini, 2025). This observation reveals a key tension in the literature: while citizen participation is celebrated for its democratic virtues, its implications for the credibility of performance information remain underexplored. Participation alone does not automatically improve performance assessment; without clear rules of aggregation, verification, and interpretation, it may even undermine confidence in official evaluations.

Building on these insights, this article advances the argument that transparency and citizen participation should not be understood merely as normative or democratic ideals, but as epistemic mechanisms within performance assessment systems. I argue that citizen-oriented platforms acquire their analytical value not simply by enabling participation, but by functioning as alternative sources of validation that can corroborate, contextualize, or challenge administrative performance data. When embedded within digital data ecosystems that allow for cross-verification and traceability, citizen feedback enhances reliability by reducing information asymmetries and constraining opportunistic reporting. This perspective directly addresses the literature gap by shifting the focus from whether transparency and participation matter to how they produce credible and trustworthy performance information–thereby aligning performance measurement with the broader governance objective of public trust formation.

Digital Data Ecosystems, Multi-Source Performance Evaluation, and the Conceptualization of Reliability

Digital data ecosystems have emerged as a defining feature of contemporary public sector performance assessment, enabling the systematic integration of administrative records, open government data, and citizen-generated feedback within unified evaluative frameworks. International organizations such as the OECD (2022) and UNDP (2009) emphasize that digital tools significantly enhance the technical dimensions of performance measurement by improving indicator standardization, real-time monitoring, data accessibility, and cross-organizational comparability (United Nations Development Programme, 2009; Baredes, 2022). In contrast to traditional, silo-based reporting systems, digital ecosystems facilitate continuous data flows and reduce temporal and informational gaps between service delivery and evaluation.

Empirical evidence from civil society and non-governmental organization (NGO) performance research further reinforces the value of multi-source evaluation frameworks. Studies demonstrate that combining internal administrative indicators with external stakeholder data strengthens organizational accountability, learning capacity, and legitimacy (Álvarez-Otero, Álvarez-Valle, Arenas-Parra, Quiroga-García, 2024; Hanay, Uzun, Özder, 2020; Gholipour, Sadeghi, Qolipour, Haeri, Hamrahi Yengejeh, Mohammadi, 2025). Importantly, Cooke (2019) and Scott (2007) argue that such ecosystems reconfigure power relations in performance assessment by enabling non-state actors–civil society organizations, researchers, and citizens–to interrogate and challenge official performance narratives (Scott, 2007). In this sense, digital data ecosystems do not merely improve measurement accuracy but also alter the governance logic of evaluation by expanding who can observe, interpret, and contest performance information.

Despite these advances, the existing literature remains analytically incomplete. While the benefits of multi-source data integration are well documented, most studies treat digital data ecosystems as neutral technical infrastructures rather than as institutional arrangements that actively shape credibility and trust. The dominant focus remains on efficiency, indicator quality, or data availability, with limited attention to how reliability is constructed, stabilized, and recognized within these systems. This limitation reflects a broader conceptual gap in public sector performance literature concerning the meaning and role of reliability.

Reliability is rarely theorized as an independent analytical category. Instead, it is implicitly equated with methodological rigor, indicator validity, or organizational evaluation capacity (Esden, 2001). Research on NGO evaluation capacity suggests that institutional learning and professionalization improve evaluation outcomes (Cooke, 2019; Ngai, Cheung, Ng, Li, Chen, Wang, Yu, 2025; Golini, Landoni, Kalchschmidt, 2017; TÜSEV. Monitoring matrix on enabling environment for civil society development: 2020–2021 Türkiye report, 2023), yet these insights are seldom extended to digitally mediated or citizen-centered performance assessment contexts. As a result, reliability is treated as an internal technical property of measurement systems rather than as an outcome shaped by institutional design, data plurality, and public scrutiny.

This article advances a different analytical perspective by conceptualizing reliability as a socially constructed and institutionally mediated phenomenon. From this viewpoint, digital data ecosystems contribute to reliability not simply by increasing data volume or precision, but by embedding verification, traceability, and cross-validation mechanisms into performance assessment processes. The coexistence of administrative data and citizen-generated feedback enables continuous comparison between official representations of performance and lived service experiences. This interaction constrains opportunistic reporting, exposes inconsistencies, and enhances the perceived credibility of performance results.

By integrating digital infrastructures with citizen-oriented platforms, performance assessment systems move beyond closed managerial control toward open, reflexive governance architectures.

Reliability, in this context, emerges from visibility, contestability, and sustained public engagement rather than from technical sophistication alone. This reconceptualization directly addresses a key gap in the literature by explaining how digital data ecosystems institutionalize reliability and link transparency to public trust–thereby supporting the article's broader aim of reframing performance assessment as a legitimacy-producing mechanism in contemporary public administration.

Illustrative Cases of Citizen-Oriented Digital Platforms

To illustrate how digital data ecosystems and citizen-oriented platforms operate in practice, this section briefly discusses two well-documented platforms–FixMyStreet in the United Kingdom and the NYC 311 Open Data and Feedback System in the United States. These cases exemplify how multi-source data integration, citizen validation, and continuous public scrutiny enhance transparency and reliability in public sector performance assessment.

The UK-based FixMyStreet platform enables citizens to report local public service issues such as road damage, street lighting failures, and waste management problems directly to local authorities through an open digital interface. Submitted reports are publicly visible, allowing other users to track the status of each request and observe official responses. Importantly, citizens can confirm whether an issue has been satisfactorily resolved or challenge its closure, introducing a feedback-based validation mechanism. Through the integration of citizen-generated data with administrative response records, FixMyStreet institutionalizes transparency and reliability by reducing information asymmetries and enabling continuous public scrutiny of local service performance (Report, view, or discuss local problems, 2025).

A complementary large-scale example is provided by New York City's 311 Open Data and Feedback System, which functions as an integrated digital data ecosystem combining administrative service records with citizen-generated feedback. All service requests, response times, and resolution outcomes are published in open data formats and updated in near real time. This transparency enables independent verification by researchers, journalists, and civil society organizations, transforming performance assessment into a continuously verifiable governance process. Crucially, the NYC 311 model demonstrates that open data alone does not guarantee reliability; rather, reliability emerges when administrative performance information is systematically cross-checked with citizen feedback and external scrutiny. In this way, the platform embeds reliability within institutionalized verification and data integration mechanisms (311 Service Requests from 2010 to Present).

Together, these illustrative cases reinforce the article's central argument that transparency and reliability in public sector performance assessment are not automatic outcomes of digitalization. Instead, they are institutionally produced through the interaction of administrative data, citizen participation, and digital governance architectures that enable cross-validation and sustained public oversight.

Conclusion. This article examined how digital data ecosystems and citizen-oriented platforms reshape public sector performance assessment by enhancing transparency and reliability. Drawing on a qualitative and analytical synthesis of the literatures on public administration, performance measurement, co-production, and digital governance, the study moved beyond descriptive accounts of digitalization to identify the institutional mechanisms through which performance information becomes credible, legitimate, and trust-enhancing.

The analysis confirms that traditional performance measurement systems–based on internally generated administrative data and hierarchical reporting–remain institutionally functional but normatively insufficient. While they support managerial coordination and internal control, they reproduce information asymmetries, marginalize citizen experience, and rely on presumed rather than demonstrable credibility. Digitally enabled performance assessment, by contrast, alters the epistemic foundations of evaluation by integrating multiple data sources and institutionalizing structured interaction between governments and citizens.

In direct response to the research question, the study identifies three interrelated mechanisms through which digital data ecosystems and citizen-oriented platforms enhance transparency and reliability in public sector performance assessment. First, digital data ecosystems strengthen transparency by institutionalizing data standardization, traceability, and comparability across administrative and non-administrative data sources. Second, citizen-oriented platforms enhance reliability by introducing alternative sources of validation that corroborate, contextualize, or challenge internally generated performance data. Third, the interaction between administrative data and citizen-generated feedback reduces information asymmetries and constrains opportunistic reporting, thereby strengthening the credibility and legitimacy of performance assessment outcomes.

These findings demonstrate that transparency and reliability are not automatic consequences of data openness or citizen participation alone. Rather, they are institutionally produced through the design of digital governance architectures that enable cross-verification, public scrutiny, and continuous interaction between governments and citizens. In this context, performance assessment evolves from a one-time reporting exercise into a reflexive and continuously contested governance process.

The central theoretical contribution of this study lies in reconceptualizing reliability as a socially constructed and institutionally mediated outcome rather than a purely technical attribute of indicators. Reliability emerges from visibility, contestability, and sustained public engagement enabled by digital and participatory infrastructures. By explicitly linking transparency and reliability to public trust, the article reframes performance assessment as a legitimacy-producing governance mechanism rather than a narrowly managerial tool.

From a policy perspective, the findings suggest that governments seeking to strengthen accountability and public trust should treat digitalization as an institutional redesign rather than a technical upgrade. Digital data ecosystems should be developed as governance architectures embedding clear rules for data integration, verification, and traceability across administrative records, service delivery data, and citizen feedback. Likewise, citizen-oriented platforms should be formally institutionalized within performance assessment systems, supported by standardized indicators, aggregation rules, and analytical capacities that transform citizen participation into a reliable epistemic resource.

Overall, this study contributes to closing a key gap in the literature by explaining how digital data ecosystems and citizen-oriented platforms jointly transform public sector performance assessment. By integrating transparency, reliability, and citizen participation within a single analytical framework, it advances a governance-oriented understanding of performance measurement. Future research may build on this framework through empirical investigations of specific platform designs, sectoral applications, and cross-country variations, further refining our understanding of credibility and trust in digitally mediated public governance.

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CONTRACTUAL SUCCESSION LEGAL NORMS FUNCTIONALIZATION ISSUES. SECOND PART

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Abstract. Mentioned article analyze contractual succession norms issues in regard to applicable law norms in regard to *de lege ferenda* legal relations in contracts and deals with *mortis causa* intention and consequences. To denote *mortis causa* contracts and deals legal basis and consequences by this moment contractual succession doctrine and practice uses *lex personalis* and *lex rei sitae* collision bindings. However, mutual and joint wills presence in contractual succession, as well as inheritance contract institute availability, this coexistence for applicable law denoting procedure goals force to involve in this process *lex voluntatis* collision binding.

Due to this circumstance article gives analyze *lex voluntatis* collision bindings' insertion into contractual succession law norms for mentioned norms' formation issues.

Article finishes with model code suggestion.

Key words: applicable law, contractual succession, inheritance, inheritance agreement, inheritance contract.

Introduction. Civil Law of the Republic of Latvia (hereinafter – Civil Law) section 639 states, that

Contractual inheritance shall be founded by contact pursuant to which one party grants the rights to his or her future inheritance or its part to another party, or several parties grant such rights to each other. Such a contact is termed an inheritance contact.

Terminology set forth in this section leads the interpreter to conclude that contractual succession is established solely by an inheritance contract. This conclusion basis is the provision stipulated in this section regarding future inheritance.

At first glance, this statement has a complete, closed structure.

However, this definition complete structure is based according with Civil Law section 1511 second sentence requirements.

For contractual succession legal regulation this statement regulates essential, but only discrete part of this institute – inheritance contract.

This statement in regard to contractual succession complexity is incomplete and does not reflect contractual succession full structure.

Contractual succession legal regulation needs branched structure.

Mentioned structure provided by Civil Law section 639 provisions together with Civil Law section 1511 first sentence provisions.

Civil Law section 639, together with Civil Law section 1511 first sentence provisions creates the basis for inheritance agreements' uprising and further normative and doctrinal recognition – mentioned section states, that

A contract within the widest meaning of the word is any mutual agreement between two or more persons on entering into, altering, or ending lawful relations.

Inheritance contract in its widest meaning forms inheritance agreement – term *widest meanings* under mentioned Civil Law section context defines private – family, testamentary and obligation law norms and their combinations, which denote inheritance agreements' compound and essentials.

Without a doubt, under these circumstances statement *contractual inheritance shall be founded by contact* does not reflect categories' *the rights to future inheritance* and *part to future inheritance* pri-

vate norms essentials, which regulate inheritance objects' uprising and existing according with indirect forms and their consequences principal components for mentioned categories legal basis arising.

In regard to contractual succession legal relations' multiple objected presence and for norms' functionalization purposes this institute should to be constructed with its own regulation, contractual succession statute.

It should be noted that the last formulation of the title of the statute – contractual succession statute – seems more accurate due to the reflection of the essence of the legal relations of contractual succession – some legal acts recognize as contractual succession institutions not only alienation contracts and agreements concluded with *mortis causa* clause, but also, by *re Dale* and *re Goodchild* statements' motives, joint and mutual wills.

Decision in *re Dale* case states, that

To the effect that where two individuals have agreed as to the disposal of their property and have executed mutual wills in pursuance of the agreement, on the death of the first ("the first testator"), the property of the survivor ("the second testator"), the subject matter of the agreement, is held on an implied trust for the beneficiary named in the wills (Pawlowski, 2023)

Decision in *re Goodchild* states, that

Two wills may be in the same form as each other. Each testator may leave his or her estate to the other with a view to the survivor leaving both estates to their heir. But there is no presumption that a present plan will be immutable in future. A key feature of the concept of mutual wills is the irrevocability of the mutual intentions. Not only must they be binding when made, but the testators must have undertaken, and so must be bound, not to change their intentions after the death of the first testator (Pawlowski, 2023).

The legal nature of the legally binding agreements underlying mutual wills is as follows.

The survivor undertakes to abide by the terms agreed upon by the parties and not to change them in accordance with his or her own (unilateral – author's note) will. Parties to mutual wills agree not to change or revoke the terms and conditions of their joint will without the consent of the other testator. It is stipulated that once the first testator dies, their part of the agreement is fulfilled. The other party cannot terminate the agreement by changing their will, even if changes in life circumstances after the death of the first partner justify such changes.

The answer to this problem should be a model law.

Because of these circumstances model law should to contain following essentials: contractual succession law definition, inheritance agreement essential terms under Civil Law sections 639, 1511 requirements, bilateral inheritance agreement or other legal deal legal nature and consequences under provisions set out in Civil Law section 639, unilateral dispositions, bilateral dispositions, bilateral dispositions' admissibility limits, bilateral dispositions irrevocability definition.

Simultaneously model law should to contain essentials and application of marital rights, donation rights, and testamentary inheritance rights in determining inheritance share value share in inheritance contracts, agreements and legal deals involving contractual succession conditions.

Discussion. Contractual succession law fundamental tenet is testator's family members' protection. It is precisely to implement this principle that the institutions of compulsory shares and inalienable heirs were developed in inheritance law. In contrast, the law of obligations prioritizes freedom to enter into contracts, and the well-known antagonism between these categories raises the question of how the institutions examined in this article will interact in the context of an inheritance agreement, as research on this topic is virtually nonexistent.

Further analysis is intended to fill this gap.

The complexity of creating a statute of contractual succession is manifested by the fact that contractual succession institutes contain both the inheritance statute of private international law and the obligatory statute.

As a result of this circumstance, the categories defining the individual legal status of a person, the subject of legal relations, the form of legal acts, and other essential components of contractual succession institutions have different content.

An example in this case is the form of the institution of contractual succession: according to the provisions of regulatory acts, the aforementioned inheritance agreement is concluded in notarial form (Civil Law, section 643).

In turn, mutual wills can be drawn up in simple written form, since in this case the notarial form of the legal act is optional.

In this case arises a question: how notarial form as an essential part of *de lege ferenda* law will be recognized by competent law and, in continuation, by contractual succession legal order in the event of recognition of joint, reciprocal or mutual wills as an inheritance contract.

Will this recognition should legally binding?

However, it is precisely the simple written form of this legal act that can become a stumbling block in the event of a dispute or questions of implementation in the legal system of another state.

According to Civil Law section 606 provisions, a mutual will may be recognized as an inheritance contract with all the ensuing legal consequences; for example, an interested party may request through the court that this legal act should be declared as invalid due to a defect in form.

In this situation mention for this recognition importance for *de lege ferenda* law objectives for future inheritance norms may be rejected accordingly with public policy grounds (Civil Law, section 24).

How the question of applicable inheritance and/or obligation law will be resolved remains open.

Contractual succession contains a large number of similar conflicts in the situation of entering into legal relations on contractual succession, implementation and application of contractual succession norms which denotes with discrete nature secured *lex voluntatis* collision binding norms.

In this context term *discrete nature* means family law, testamentary law and different obligation law norms, which arose at the moment when parties entry into contractual succession relationships.

In turn, contractual succession statute creation and its consolidation should eliminate these problems with admissibility limits instruments.

Contractual succession statute must lay down the functional architecture of its own legal system, starting from this institute formation including the system of its sources, ending with the development of models of law enforcement and corresponding forms of justice.

Of course, contractual succession statute must undergo adaptation from the idea of law to reality. Only in this case contractual succession statute become a full-fledged basis for establishing a legal situation that corresponds to the real legal order and on this path this article should serve as the basis for its formation.

Contractual succession statute is a construction with a multifaceted structure.

Succession law, prescribed inheritance by will uses three conflict-of-laws bindings to determine the applicable law – *lex personalis* and *lex domicili* adopted to determine the legal status in movable property inheritance consequences, while to determine the applicable law in the situation of inheritance of immovable property, conflict binding *lex rei sitae*.

The main conflict of laws clause used in relations arising from obligation law constituted by *lex voluntatis* formula.

Contractual succession statute should to ensure correct norm functionalization should to combine mentioned formulas.

It seems reasonable to assert that the law applicable to contractual succession is in the plane of combining the above-mentioned collision bindings.

Based on this circumstance, for this analysis purposes, two problems were selected: an analysis of the sources of law in relation to contractual succession and an attempt to determine the legal order applicable to contractual succession.

An additional reason for the derivation of the statute of contractual succession is that the law applicable to the contract is determined by conflict binding *lex voluntatis* – freedom to conclude a contract, the main principle of which in the doctrine is the principle called *closest connection principle*.

The principle of closest connection, in turn, is mediated by the link between the contract and the law of the state with which the contract is most closely connected.

In this regard, it seems necessary to mention that legal doctrine indicates that

"closest connection" adjustment in international inheritance law is used extremely rarely and entails, in turn, the need to delimit it from the place of preferential residence (Haas, 2004).

Thus, the main task in developing the statute of contractual succession is to achieve a reasonable and logical separation or linking of the personal law of the testator and the law of the state with which the contract *mortis causa* is most closely connected.

An inheritance may be opened in several states.

Under these circumstances, closest connection principle should provide exceptions for *lex personalis* and *lex rei sitae* collision bindings.

The traditional and main principles of conflict of laws for determining the law applicable in inheritance relations are the personal law of the testator, which includes citizenship and/or his domicile.

The inheritance of movable property and its accessories occurs precisely taking into account the categories of the personal law of the testator.

In turn, the inheritance of real estate occurs in accordance with the rules of conflict of laws *lex rei sitae* – according to the location of the property in question.

However, this system is not universally applicable – German law applies the principle of unitary inheritance – if testators possesses with German citizenship, his personal law under moveable and immovable property succession underlined to German law (Introductory Act to the Civil Code, article 5).

In the case of inheritance by will, succession law, as the law applicable to inheritance, enshrines the principle of the law of the place where the will was made.

However, in contractual succession situation, the applicable law must be determined differently – law, prescribed by *lex voluntatis* collision binding must be applied to contractual succession law norms including law, prescribed by *lex personalis* collision binding.

Lex voluntatis – collision binding, prescribed autonomy of choice of law, based on the principle of the voluntarily expressed and realized contractual succession involved parties' independence of choice, manifesting their will with maximum extent.

Lex voluntatis and *lex personalis* collision bindings' norms should denote involved parties' will expression with *lex loci coindentiae testatoris et heredes hereditarium commodum* formulas' norms.

In opposite case relation, which arises from contractual succession, may be noted as a relation with will expression, which made without choice of law, which prescribed closest connection principle.

It should be noted that in the absence of a choice of law stipulated in the contract or other contractual succession deal, the law of the state with which the contract mediating contractual succession is most closely connected applies.

However, this act may not comply *lex loci coindentiae testatoris et heredes hereditarium commodum* formulas' requirements, enacted in *lex locus actus* collision binding.

It is quite certain that denoted by applicable law autonomy of choice and the place of drawing up a will or another contractual succession contract or deal, possesses with logical continuation *lex locus actus* collision bindings' imperatives.

This may result if contractual succession contract or deal involved parties choose the applicable law in accordance with abovementioned binding rules.

However, if contractual succession joint choice law is essential to a discrete *mortis causa* disposition, distinct from the choice of law, applicable to a complete situation of a unilateral or lateral legal

deal, which involves will expression for only one party – only for heir or testator – this situation lead to will defect.

By this reason, the place, acknowledged as a place where contractual succession contract or deal is concluded will differ from the place where mentioned contract is drawn up *de facto*.

Accordingly, norms, which essentials to *lex personalis* and *lex rei sitae* collision bindings will not match with norms, which essentials to denote applicable law to contractual succession contract or deal with *lex voluntatis* collision binding.

Consequently, involved person making the choice of law, or applying the law chosen by the parties under mentioned situations, faces with this choice appropriateness and legitimacy.

The law applicable to testamentary succession as a contractual succession essential in mutual wills as a contractual succession deal conditions and the law, applicable to contractual succession obligations in wide sense – under situation of testamentary succession as a part of contractual succession have different characteristics and application conditions in regard to *lex personalis*, *lex rei sitae* and *lex voluntatis* collision bindings and their acceptable combinations.

Analogical situation presents under situation of inheritance by inheritance by contract, concluded under Swiss Civil Code article 494 rules.

Person, entering into a contractual succession relationship must take into account the fact that an inheritance contract concluded in accordance with the rules of the Swiss Civil Code, which is valid with respect to Swiss law due to its form, content, and consequences, may not be recognized by another state legal system.

The reason is the ambiguity of the legal formulations that define the essential components of this agreement.

Since in the case of this agreement it is necessary to determine the applicable law in accordance with Swiss Federal Act on Private International Law articles 86-96, 112, 113, 116, 117, 119, 124. With mentioned article dispositions conflicts possible even due to a clash of legal norms within this act.

To further illustrate the problematic of the law applicable to contractual succession, it seems appropriate to model the situation using the example, based on object qualification under contractual succession institutes in Austria and Switzerland.

The main sources for analysis, in addition to the Swiss Federal Act on Private International Law, will be Austrian Act on Private International Law, General Code on Civil law (ABGB) and some provisions of the Swiss Civil Code will also be examined.

This analysis is quite important. In the introductory laws and laws on international private law according to Professor Henry Batifol *(Battifol, Henry)* contains *conflict of laws rules that refer to the law of the forum* (Battifol, Lagarde, 1993).

Before the changes that took place in 2014, the contract mediating contractual succession was set out in General Code on Civil law (ABGB) paragraph 1217 as follows:

A marriage contract is an agreement concluded with the purpose of respecting the marriage union, for the protection of property rights, and especially of its objects: a dowry, a widow's share of the inheritance... an inheritance agreement or a life-long use of property with the intention of supporting the widow in case of death.

In turn, the inheritance agreement in the Swiss Civil Code is fixed in the following form:

The testator may, by contract of succession, undertake to another person to bequeath his or her estate or a legacy to that person or a third party. He or she is free to dispose of his or her property as he or she sees fit. However, testamentary dispositions or gifts that are incompatible with obligations entered into under the contract of succession are subject to challenge. (Swiss Civil Code, article 494).

In light of these rules, it is unclear how the phrase *"he or she is free to dispose of his or her property as he or she sees fit*" will be interpreted. Collision bindings' *lex voluntatis* rules fix, that this formulation can be applied as an essential to donation agreement/contract law, or to inheritance contract law. Also in this situation, according Federal Act on Private International Law article 19 provisions, collision bindings' *lex personalis* and *lex rei sitae* rules can split mentioned relation in – in the absence of *lex voluntatis*, this formula justified excluding or this collision bindings' norms' validity ignoring, this relation should be regulated by the law determined by the objective location of the contract, based on the conflicting norms of the legal system of the competent authority.

But term *objective location of contract* content also can be different.

Donation contract may be concluded in country, which legal order control property, which is defined as donation contract property as an essential component of inheritance contract.

Whereas inheritance contract can be concluded in country, which legal order control property, which is defined as an inherited property, property which has closest connection with inheritance contract.

In the situation of an applicable law denoting under cross-border contractual succession obligation, in the presence of the above mentioned formulations, the parties to the contract are faced with a dilemma: the law of which state should be stipulated in the contract and which will subsequently be applied by the body implementing the law.

The substantive categories for determining the applicable law contained in the Austrian Private International Law Act and the Swiss Private International Law Act respectively is as follows:

Factual situations with foreign contracts shall be judged, in regard to private law, according to the legal order to which the strongest connection exists (Austrian Act on Private International Law, first paragraph).

It should be noted that the Austrian Law on International Private Law mediates the substantive connection between foreign law and national law – terms' *strongest connection* rules refers to substantive law.

In turn, the Swiss Law on International Private Law introduces the principle of establishing foreign law by introducing a procedural aspect:

The contents of the foreign law shall be established by the authority on its own motion. For this purpose, the cooperation of the parties may be requested. In matters involving an economic interest, the task of establishing foreign law may be assigned to the parties. Swiss law applies if the contents of the foreign law cannot be established. (Federal Code on Private International Law, article 16).

Undoubtedly in this case there is a conflict between the collision binding *lex voluntatis*, which norms, according to mentioned laws of Austria and Switzerland, differ in content.

It seems reasonable to raise the question of how the applicable law will be established.

A conflict-of-laws rule has the following components: scope and binding. Scope indicates the range of social relations subject to legal regulation, while binding specifies the applicable law.

Analyzing General Code on Civil law (ABGB) paragraph 1217 through the lens of the concept of conflict-of-laws scope, it seems plausible to conclude that the range of social relations covered by this provision is extremely broad. To determine the applicable law, it requires a reasonable narrowing – it is impossible to imagine that both inheritance and content-based relationships would be covered under the same denominator.

According to the pandect doctrine of law, these relations are located in different sections of legal regulation and have nothing in common between them.

Undoubtedly, General Code on Civil law (ABGB) paragraph 1217 requires qualification to denote acceptable testamentary dispositions in this paragraph body. This reason is a multiple object fixing in this norm – marriage contract concluded with the purpose of respecting the marriage union gives

leastwise four objects for acceptable testamentary dispositions:

1) a dowry;
2) a widow's share of the inheritance;
3) an inheritance agreement;
4) life-long use of property with the intention of supporting the widow in case of death.

Qualification should be carried out at the initial stage of overcoming conflicts of laws (resolving so-called latent conflicts) and allows, by correlating the factual nature of specific relationships with the relevant norms of a given legal system, to identify the conflict rule that will determine the applicable law, and then determine this law itself, the status of the relationship.

It is the evidence of the parties and the court's effective search for the law that will answer the question of the status of the relationship, which in turn will reveal the closest connection of the relationship with the legal order of a particular state, as required by Austrian Act on Private International Law above-mentioned norm.

However, arises a question: how will the closest connection of the relationship with the legal order of a particular state are expressed in the situation of the application of the contract in relation to real estate?

Austrian Act on Private International Law establishes, that

Acquisition and loss of property rights in corporeal things, including possession, shall be judged according to the law of the state in which the things are located at the time of competition of the factual situation underlying acquisition or loss. (Austrian Act on Private International Law, paragraph 31).

A factual situation in law is defined as the totality of legal facts, both positive and negative, necessary for the emergence of a specific legal relationship. In this case, the problem of finding the applicable law under General Code on Civil law (ABGB) paragraph 1217 fraught with legal uncertainty.

For applicable testamentary law denoting is necessary a set of legal facts of a negative nature associated with *death of the testator* concept.

For applicable obligation law denoting is necessary a set of legal facts, associated with *life-long use of property with the intention of supporting the widow in case of death* concept.

To denote applicable contractual succession law necessary to combine with necessary complicating degree mentioned above concepts.

Concepts, fixed in *a dowry, a widow's share of the inheritance, an inheritance agreement* legal categories relate to testamentary law directly.

In turn concept, fixed in *in case of death* category refers to obligation law, this concept connection with testamentary law by subconcept *in case* possesses only in indirect posture.

Additionally, relationships associated with concept *life-long use of property with the intention of supporting the widow* are linked with positive legal facts' compound.

In case of mentioned agreement recognizing within Switzerland territory, Swiss Federal Act on Private International Law, in terms of legal regulation of issues related to the emergence and exercise of property rights to real estate, introduces a quite contradictory rules – mentioned relation regulate three norms – Federal Act on Private International Law articles 52, 92, 100.

Mentioned articles state:

The acquisition and loss of personal property rights are governed by the law of the place where the personal property is located at the time of the facts on which the acquisition or loss is based (Federal Act on Private International Law, article 100).

The law applicable to the inheritance estate determines what is included in the estate, who is entitled to inherit and for what share, who is liable for the debts of the estate, which legal institutions of inheritance law may be relied upon, and which measures may be ordered and subject to which requirements (Federal Act on Private International Law, article 92).

Marital property relations are governed by the law chosen by the spouses.

The spouses may choose the law of the state in which they are both domiciled or will be domiciled after the marriage celebration, or the law of a state of which either of them

is a national. (Federal Act on Private International Law, article 52).

Under this regulation applicable law denoting and it's further enforcement tears apart within three essentials imperatives:

1) governed territory legal order for acquisition and loss of personal property rights, the law applicable to the inheritance estate determines what is included in the estate;

2) [person] who is entitled to inherit and for what share;

3) [person] who is liable for the debts of the estate, governed territory for marital property relations for *de lege ferenda* purposes

This situation demonstrates that *lex personalis* and *lex rei sitae* collision bindings for mentioned factual situation are not quite flexible.

Agreements, concentrated in agreement, concluded with General Code on Civil law (ABGB) paragraph 1217 requirements contain rights to real estate and other *de lege ferenda* rules which are characterize with undeniable, these rights nature in regard to subject matter to the law of the state in whose territory the property is located is unqualified.

Additionally, because Federal Act on Private International Law article 52 states that *marital property relations are governed by the law chosen by the spouses*, this circumstance provides permissibility of the choice which indicated in relation to the agreement, concluded with General Code on Civil law (ABGB) paragraph 1217 requirements content divide in three forms of marital property

1) marital property, which spouses decided as an inheritance contract property;

2) marital property, which spouses decided as a marital contract;

3) marital property, which spouses denoted as marital contract as a future inheritance contract property object.

Without a doubt, in this situation, using only private legal acts to determine the applicable law will complicate above mentioned objects' qualification.

Limits and admissibility of the choice of law are regulated not only by the normative acts of individual states – the law of the European Union is also regulated by regulations and directives that have direct effect and fill in the gaps in legal regulation and, in problematic situations, serve as sources of law, including the law that must be applied to the institutions of contractual succession.

It appears that the main regulatory documents in determining the applicable law in a situation of contractual succession should be the following regulatory acts:

1. Council Regulation (EC) No 4/2009 of 18 December 2008 on jurisdiction, applicable law, recognition and enforcement of decisions and cooperation in matters relating to maintenance obligations (hereinafter – Regulation 4/2009);

2. Regulation (EC) No 593/2008 of the European Parliament and of the Council of 17 June 2008 on the law applicable to contractual obligations (Rome I) (hereinafter – Regulation 593/2008);

3. Regulation (EU) No 650/2012 of the European Parliament and of the Council of 4 July 2012 on jurisdiction, applicable law, recognition and enforcement of decisions and acceptance and enforcement of authentic instruments in matters of succession and on the creation of a European Certificate of Succession (hereinafter – Regulation 650/2012);

4. Regulation (EU) No 1215/2012 of the European Parliament and of the Council of 12 December 2012 on jurisdiction and the recognition and enforcement of judgments in civil and commercial matters (hereinafter – Regulation 1215/2012)

At first glance, the number of regulatory documents and their titles indicate that the law applicable in the situation of contractual succession will be established and its limits will be determined correctly and in accordance with the specific legal situation.

However, an analysis of the regulatory framework of these regulatory documents allows us to conclude that there is a lack of proper regulation.

For example, Regulation 4/2009 article 11 fixed in mentioned regulation introduction provides the following:

The scope of this Regulation should cover all maintenance

obligations arising from a family relationship, parentage, marriage or affinity, in order to guarantee equal treatment of all maintenance creditors….

Further, the provision is established, that

For the purposes of this Regulation,

the term "maintenance obligation" should be interpreted autonomously.

In other words, Regulation 4/2009 refers the interpretation of the essential terms of the applicable law to the rules of the statute of free expression of the will of the parties to the contract.

Although Regulation 4/2009 is a good instrument for establishing the law, in relation to an agreement arising from General Code on Civil law (ABGB) paragraph 1217 if the agreement is qualified as an agreement which regulation is fundamentally inappropriate for establishing applicable law as a contractual succession law in wide sense – term *maintenance obligations* by legal categories *a dowry, a widow's share of the inheritance and an inheritance agreement* by permission, fixed in term *autonomously* may refer applicable law to testamentary law as a contractual succession law discrete part.

The reason for this conclusion is that the essential conditions correspond to the contract concluded in accordance with Swiss Civil Code article 494 requirements.

In turn, the qualification of the interaction of the norms of General Code on Civil law (ABGB) paragraph 1217 with Swiss Civil Code article 494 norms is complicated by norms that establish *emergence of a factual situation related to the acquisition or loss of rights* legal category.

In determining the law applicable to contractual succession, because of second article statement it is also impossible to use the provisions of Regulation 593/2008.

Article 2 of this document establishes the following provision:

Obligations arising out of matrimonial property regimes, property regimes of relationships deemed by the law applicable to such relationships to have comparable effects to marriage, and wills and succession

A similar provision in relation to the law applicable to contractual succession is also present in other regulations mentioned above.

Due to these circumstances, the legal regimes that establish and mediate the institutions of contractual succession are not fully clarified; their regulation by legal acts of the European Union does not allow interested parties to find the correct method of legal regulation.

Referring to national legal acts to correctly establish the applicable law is also problematic due to the lack of a single, unified concept of both the inheritance contract itself and a general understanding of contractual succession.

Since contractual succession is a complex legal institution, it is impossible to attribute the problem of determining the applicable legal order unambiguously to inheritance law. It is also impossible to accurately determine the applicable law using the legal framework of the law of obligations.

Based on the above, it seems necessary to carry out a doctrinal and normative distinction of the statute of the right of inheritance obligations (or the statute of contractual succession) with the creation of specific legal regulation.

The need for normative identification of the right of contractual succession is an important legal task.

The doctrinal development of the statute of contractual succession is also important because of the following reason – according to professor Ulrich Haas

In German law, the inheritance statute covers all the consequences of the opening of an inheritance, whereas the inheritance statute of common law countries concerns only the issues of the status of the heir, that is, who is the heir and what share is due to him, but not issues related to the stages of administration and probation (Haas, 2004, 477).

In questioning *consequences of the opening of an inheritance* category in relation to the statute of contractual succession, the problem raised by the esteemed professor is quite relevant – the opening of an inheritance as a legal fact and the existence of legal situations arising from it is in the plane of the perception of inheritance law in the forms of inheritance by law and will, as well as in the situation of contractual succession, is quite controversial.

The concepts of similar categories also vary depending on the area of legal regulation and applicable law.

Collision bindings *lex personalis* and *lex rei sitae* apply only to the consequences of inheritance, without denoting and regulating the law applicable for legal deal body itself, as a separate, isolated form – these ties cannot determine the law applicable to the contract.

The law applicable to the contract is governed by the general conflict of laws clause *lex voluntatis*, which leaves the determination of the applicable law entirely to the will of the parties to the contract. The validity of this binding is limited only by the public policy of the national state. This provision is unacceptable for contractual succession.

For these reasons, specific legal regulation must be developed for contractual succession.

The theory of contract law bases the contract on the principle of obtaining *the maximum social benefit from trade* (Bix, 2006, 10). It seems that by modifying this principle in relation to contractual succession, it will be possible to formulate a provision that will serve as the basis for finding the law applicable to this institution.

In the context of the harmonization of European Union law, there is a significant legal basis for such a step – Case 120/78, heard by the Court of Justice of the European Communities on 2 February 1979. Although the subject of this case is trade relations, an important outcome of this case was the development of the concept of mutual recognition of civil law forms in various spheres of life within the European Union. However, as noted above, simple mutual recognition in determining the applicable law very often clashes with the public policy of a nation state.

Of course, in this situation the issue could be resolved by harmonizing the norms of inheritance and contractual law, but this has its negative aspects, in particular the unification of private law institutions is associated with fairly large costs due to the principle of *dependence on the previous trajectory of development* (Smits, 2002, 99).

This principle includes the categories designated by the terms *the principle of predominance* and *the principle of impurity* (Hodgson, 1988).

Certainly, creating legal regulation, legislator and legal doctrine assignees must put predominance principle first. This principle that will allow to identify a priority relationship and, by applying impurity principle, filter out subsidiary categories that do not contribute to the correct definition of the forms of contractual succession and the creation of its legal basis.

Note: predominant [principle] – several motives may have operated, is one of greater force and effect, in producing the given result, than any other motive (Matthews v. Bliss, 22 Pick. (Mass.) 53.

Results. Contractual succession institutes contain a number of provisions in regulatory acts that only presume a future inheritance without establishing its status in relation to existing regulation norms in regard to *de lege ferenda* regulation.

These provisions do not establish hereditary mass objects' arising, involved persons' individual status and their legitimate actions in situations, when mentioned institutes locate in a transitional situation – when contract or deal recognized by another and when previous legal regulation is being replaced by the new.

A future inheritance arises depending on the occurrence of conditions that, according to the textual interpretation, establish the emergence of objects of future inheritance as an alternative means of fulfilling obligations.

Lex personalis and *lex rei sitae* collision bindings for *lex voluntatis* collision binding targeted purpose with legally justified basis lead away the process of determining applicable legal regulation for contractual succession purposes toward discretional and splittable private law norms sphere.

Revocability and irrevocability of the mutual intentions essentials under *lex voluntatis* collision binding substantive law denoting for contractual succession contracts and legal deals is different.

Suggestions. To denote applicable law for contracts and legal deal with *mortis causa* intention and future inheritance objects need to compound actual relations with succession elements with actual relations who contain elements, whose imperatives fixed in obligation law, ensured by *de lege ferenda* law norms.

To finish this study analyze, subject to possible offer a model law, adopted this act as a Civil Law of the Republic of Latvia elongation. This acts' task is to justify law norms and its essentials, applicable to contracts, agreement and deals, which contain future inheritance norms and essentials.

MODEL CODE "ON THE CONTRACTUAL SUCCESSION LAW IN DISCRETE CONTRACTS, AGREEMENTS AND DEALS"

Justification for this law introduction

Justification for this law introduction is contractual succession law imperative rules regulation establishment which enshrined in this law. This justification also proved by the need to introduce into contractual succession legal regulation categories and norms essential for legal regulation prescribed by inheritance agreement mandatory norms as contractual succession central object in relation to contracts and legal deals, assigned in contractual succession:

1) Inheritance contract (Civil Law, section 639) ;
2) Inheritance contract as an inheritance agreement (Civil Law sections 639,1511)
3) Marriage contract as an inheritance contract essential/Marriage contract as a future inheritance contract (Civil Law, section 114, part three, Civil Law, section 639);
4) Mutual will (Civil Law, section 604);
5) Mutual will as a future inheritance contract (Civil Law, sections 604, 606, 639);
6) Donation agreement with future inheritance clause (Civil Code, section 1926, second sentence);
7) Donation agreement as a future inheritance contract (Civil Law, sections 639, 1926, second sentence)

The basis for this introduction is also recognized as the need to introduce a security function of legal regulation of the imperative norms of the inheritance agreement as contractual succession central object. is the acquisition by contractual succession parties of contracts and legal transactions of the future inheritance in accordance with the law.

The acquisition of future inheritance must comply with Civil Law sections' 646 provisions, taking into account the consequences of the provisions establishing the right of persons for future inheritance of the above mentioned Civil Law sections' provisions.

An additional basis for this consolidation is inheritance rights and obligations fulfilled by inheritance contracts', agreements' and deals parties and, accordingly, rights and obligations amount received by mentioned parties contradictory and unstable formation nature, indicated above contracts, agreements and deals subsistence issues.

This law provides for the clarification and normative establishment of essential categories of objects and subjects of inheritance rights and obligations, by which the parties to contracts and transactions of contractual succession, both jointly and individually, carry out the creation of an inheritance estate.

Terminology used in the law

Contractual succession law exists as a system of legal norms applied to the system of contracts, agreements, and complex nature legal deals enshrined in the Civil Law of the Republic of Latvia (hereinafter – Civil Law), as well as this law, and providing for the acquisition by the designated heir of inheritance rights to objects that meet the essential criteria of the rules on future inheritance by the inheritance contract, inheritance agreement, or legal transactions specified above (Civil Law, section 646).

Article 1. Essential terms of the inheritance agreement (Civil Law, sections 639, 1511), an inheritance agreement or a legal transaction established in accordance with Civil Law sections' 639 provisions.

The essential conditions of the inheritance agreement are recognized as the enjoyment of rights and fulfillment of obligations set forth in Civil Law of the Republic of Latvia in section 114, third part, section 604, section 639, section 1926, second sentence in accordance with Civil Law section 1673 provisions in relation to future inheritance subject matter.

Article 2. Bilateral inheritance agreement or other legal deal legal nature and consequences under provisions set out in Civil Law section 639.

(1) Each party to an inheritance agreement or other legal deal or the parties mutually have the right to make orders that comply with the essential components of Civil Law 646 and 1673 sections.

(2) If each of the parties has included in its disposition rules that do not correspond to the essential components of the Civil Law section 646 in terms of the rules on future inheritance, then the invalidity of one of these dispositions entails the invalidity of the entire inheritance agreement or other legal transaction set out in Civil Law section 639 of the Civil Law section 646 on future inheritance terms.

Article 3. Unilateral dispositions.

(1) Each party to an agreement or other contractual succession deal which occurs as the subject of this law may include in the inheritance agreement any unilateral disposition that is permitted in agreements and legal deals set out in Civil Law section 639 in terms and rules on future inheritance.

(2)With respect to such dispositions, the rules on testamentary dispositions shall apply, interpreted in accordance with Civil Law section 639 insofar as they relate to inheritance agreement provisions in wide sense – as a contractual succession legal basis. A disposition may also be revoked by an agreement revoking contractual disposition.

(3) If an inheritance agreement or other legal deal stipulated in Civil Law section 639 is cancelled as a result of the exercise of the right of unilateral withdrawal (Civil Law sections 1508, 1589) or in the manner determined by Civil Law section 1592 provisions or in the cancelling agreement (Civil Law, sections 1862, 1863, 1864, 1865, 1866), then disposition shall lose its force,

(4) Disposition shall not lose its force in cases where it is established through negotiations between the parties or a court decision that the intentions of the party to the contract or legal transaction were different and were in accordance with the provisions of Civil Law section 646 terms of provisions on future inheritance and the corresponding rules of the obligations law.

(5) Civil Law section 1589 provisions in terms of the rules on known circumstances permitted by law shall be interpreted and also applied in the manner specified for Civil Law section 1592 provisions.

Article 4. Bilateral dispositions.

A party to an agreement or legal deal, which content determined by Civil Law section 114, part three, Civil Law section 604, Civil Law section 639, Civil Law section 1926 provisions, may include agreement or deal inheritance dispositions that comply with Civil Law sections' 639, 646 provisions.

In case when inheritance dispositions text does not comply with Civil Law sections' 639 and 646, this entails the invalidity of the contract or legal deal in the part that is essential for future inheritance.

Article 5. Bilateral dispositions' admissibility limits.

An expression of will that determines the basis of an agreement according to which the parties to contracts and deals defined by Civil Law section 114, part three, Civil Law section 604, Civil Law section 639, Civil Law section 1926 provisions undertake to make or not make arrangements in the event of death, to cancel or not to cancel them, is null and void.

Article 6. Bilateral dispositions irrevocability.

Bilateral dispositions irrevocability basis is heir's contribution to the property designated by inheritance agreement or inheritance contract as inherited property.

Mutual dispositions' irrevocability moment is the date corresponding with provisions set forth above.

Article 7. Application of marital rights, donation rights, and testamentary inheritance rights in determining inheritance share value share in inheritance contracts, agreements and legal deals involving contractual succession.

Determining inheritance share value under inheritance contract, agreement or deal, property rights and obligations established by imperative rules are taken into account.

Marital rights, donation rights, and inheritance rights under a will, which are essential to the provisions of the articles set forth in Civil Law section 114, part three, Civil Law section 604, Civil Law section 639, Civil Law section 1926 provisions, in accordance with Civil Law section 1673 provisions.

This application is carried out in relation to the property equivalent of the future inheritance, as set forth in the provisions of the above-mentioned sections as the basis for applying Civil Law sections 639 and 646 requirements.

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LOCAL SELF-GOVERNMENT BODIES AS SUBJECTS OF PUBLIC POLICY IMPLEMENTATION IN THE REINTEGRATION OF RELEASED DEFENDERS OF UKRAINE

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Abstract. Russia's full-scale war against Ukraine has caused a rapid increase in the number of repatriated prisoners of war and civilians returning from forced isolation and requiring long-term reintegration. The purpose of this publication is to determine the role of local self-government bodies as subjects in the implementation of public policy on the reintegration of released defenders of Ukraine and to outline the managerial implications of decentralisation for organising post-isolation support under martial law and during post-war recovery.

The empirical basis includes statistical data from state authorities and local self-government bodies, the results of sociological surveys, and an analysis of current regulatory and legal acts in the field of reintegration of veterans and persons released from captivity. Systemic, institutional, structural-functional, and comparative-legal approaches, as well as methods of analysis, synthesis, and generalisation, were applied. It is shown that a multi-level reintegration model is being formed in Ukraine, in which local self-government bodies perform an operational role as providers of public services and coordinators of intersectoral interaction (social, medical, psychological, legal, educational, and economic), ensuring the adaptation of national decisions to the local needs of communities. The managerial significance of by-laws institutionalising algorithms for restorative measures and post-isolation support is emphasised, while risks of regulatory fragmentation, staff shortages, and the absence of unified performance indicators are highlighted.

The expediency of an integrated reintegration model combining community-based reintegration with targeted specialised interventions is substantiated, ensuring personalised support without reinforcing social segregation. The practical significance of the findings lies in identifying managerial priorities for strengthening community capacity, clarifying the powers of policy actors, and developing local programmes for the reintegration of released defenders.

Key words: public administration, state policy, decentralisation, strategic planning, repatriated prisoners of war, healthcare sector, veterans, legal regulation, territorial communities, post-isolation support.

Introduction. Russia's full-scale war against Ukraine has led to a substantial increase in the number of released defenders returning from captivity, forced isolation, torture, and other forms of ill-treatment. According to the Report of the Coordination Headquarters for the Treatment of Prisoners of War as of December 2025, since 24 February 2022, 70 prisoner exchanges have been conducted, under which a total of 6,266 military personnel and civilians have been repatriated to Ukraine, including 5,863 military personnel (5,653 men and 210 women) (Zvit, 2025).

Expectations that persons released from captivity will reintegrate into their communities without obstacles are erroneous and unfounded. Therefore, Ukrainian society must clearly understand the

strategy, core objectives, principles, and forms of reintegration into civilian life, as well as post-isolation assistance and support for former prisoners of war. A community-oriented focus in addressing the challenges of successful reintegration can become an effective step in implementing state policy aimed at their recovery.

Reintegrating servicemembers released from Russian captivity into civilian life at the level of territorial communities is an important task that requires a comprehensive and integrated approach, as communities play a leading role in creating favourable conditions for their successful recovery (community support, resources, and attitudes). Active community support and interaction with other actors involved in implementing public policy in this area can significantly facilitate the reintegration process and contribute to the inclusive restoration of released defenders' functional capacity as they return home or continue performing their service duties.

A considerable share of existing scholarly research (covering former prisoners of war from the Second World War, the Korean Wars, the Vietnam War, the Gulf War, the Yom Kippur War, the First Lebanon War, the Yugoslav Wars, etc.) focuses exclusively on assessing the psychological and psychiatric consequences of military captivity. Modelling results of the long-term effects of captivity indicate that reintegration difficulties constitute a decisive factor in the development of internalising mental disorders, which necessitates the design and implementation of systemic, institutionally sustainable interventions within the framework of public reintegration policy.

The purpose of this publication is to substantiate the role of local self-government bodies as actors in the implementation of public policy on the reintegration of released defenders of Ukraine. Achieving this purpose entails the following tasks: (1) to determine the functional and managerial role of local self-government bodies in implementing public policy on the reintegration of released defenders of Ukraine; (2) to examine the impact of decentralisation on the governance of reintegration processes; (3) to clarify the role of local self-government bodies as the territorial level for implementing public policy on the reintegration of veterans and repatriated prisoners of war under martial law and during post-war reconstruction.

The empirical basis of the study comprised statistical data from state authorities (the Coordination Headquarters for the Treatment of Prisoners of War, the Ministry of Health, the Ministry of Social Policy, and the Ministry of Defence of Ukraine) and local self-government, the results of sociological surveys, and an analysis of regulatory and legal acts in the field of reintegration of veterans and persons released from captivity. The study employed systemic, institutional, comparative-legal, and structural-functional approaches, as well as methods of analysis, synthesis, and generalisation.

Main part. The steadily increasing number of repatriated former prisoners of war has led to the emergence in Ukraine of a qualitatively new group of addressees of public policy – released defenders. The experience of forced isolation generates a different risk profile (chronic psychotraumatic and somatic consequences, legal and socio-economic complications), which places on the state the requirement to pursue a differentiated and balanced policy with regard to this specific category. The focus of the study precisely on the public policy of reintegrating military personnel released from captivity is not accidental, as this group requires substantially greater attention to ensure optimal adaptation, adequate social support, professional psychological assistance, and a longer reintegration trajectory. The research therefore centres on the reintegration of repatriated former prisoners of war either into civilian life or into the restoration of their physical and mental health, optimal work capacity, and social activity, enabling them to return home or to continue fulfilling their official duties.

Ukraine's contemporary experience in the release and reintegration of prisoners of war and civilians who were held in Russian captivity is unique due to the combination of the scale and duration of armed aggression and the systemic nature of violations of international humanitarian law. Ukraine carries out reintegration measures during the active phase of the war, which significantly distinguishes this process from the classic post-conflict models typical of most other states. This uniqueness is also

driven by the simultaneous development of the regulatory framework, institutional mechanisms of interagency coordination, a system of medical and psychological, social, and legal assistance, and the integration of international standards and practices (NATO, the UN, the ICRC). In addition, the Ukrainian case is characterised by the involvement of a wide range of governance actors-central executive authorities, local self-government bodies, civil society, and international partners-thus forming a comprehensive multi-level model of reintegration under conditions of wartime and post-war recovery.

Despite the absence in Ukraine of a comprehensive framework law that would systematically define the principles, priorities, and mechanisms of state policy in the veteran sector, 2024-2025 witnessed an intensification of rule-making activity and institutional development within the public administration system in the field of veteran support. During this period, strategic documents and operational plans aimed at building a multi-level system for the transition from military service to civilian life were adopted, in particular the Veterans Policy Strategy for the up to 2030 (hereinafter–the Veteran Strategy) (Veteran Policy Strategy, 2024) and the Strategy for Building a System of Return from Military Service to Civilian Life for the period up to 2033 (hereinafter–the Return Strategy) (Reintegration Strategy, 2024). These documents define the range of policy-making and implementation actors (central executive authorities, security and defence sector bodies, local self-government bodies, and civil society institutions) and lay the foundation for interagency coordination of reintegration measures, including for persons released from captivity. At the same time, the fragmented nature of regulatory governance creates risks of inconsistent managerial decisions, duplication of powers among public administration actors, and the emergence of legal conflicts, which negatively affects the effectiveness of the reintegration policy for released defenders. In this context, a significant step was the adoption of the Law of Ukraine «On Amendments to the Law of Ukraine «On the Principles of Domestic and Foreign Policy» regarding the formation of a comprehensive approach to domestic policy in the veteran sector» (Act, 2025), which institutionalises the principles, goals, and instruments of state veteran policy and defines mechanisms for interagency interaction, coordination, and monitoring of the effectiveness of public decisions. Further normative consolidation of the basic principles of veteran policy is envisaged by the Draft Law of Ukraine «On the Basic Principles of State Veteran Policy Regarding Veterans Who Participated in Repelling the Armed Aggression of the Russian Federation Against Ukraine» (Draft Law, 2025), which is under consideration by the relevant parliamentary committee.

Thus, the national vision of public veteran policy is being shaped on the basis of two strategic documents that define the architecture of policy implementation actors, multi-level coordination mechanisms, and key managerial instruments of reintegration, including medical and psychological, socio-economic, and legal support for released defenders of Ukraine.

The effective implementation of state policy aimed at ensuring the social and legal protection of persons released from captivity and their families was directly facilitated by the adoption of the special Law of Ukraine «On social and legal protection of persons who have been found to be deprived of their personal freedom as a result of armed aggression against Ukraine, and their family members» (hereinafter–the Law) (Act, 2022).

The delineation of the category «released defenders of Ukraine» and the legally defined legal status has been further specified by a number of acts of the Cabinet of Ministers of Ukraine and ministerial regulatory legal acts, which institutionalise expedited managerial pathways for reintegration and post-isolation follow-up, and define protocols and schedules for the reintegration of released defenders. It is also advisable to note that these subordinate acts expressly establish the following: participation in reintegration measures by released defenders of Ukraine is mandatory.

The approval by the Cabinet of Ministers of Ukraine of the Procedure for conducting restorative (post-isolation, reintegration) measures, adaptation measures, and support (follow-up) measures for persons in respect of whom the fact of deprivation of personal liberty as a result of the armed aggres-

sion against Ukraine has been established, after their release (Procedure, 2024), is of fundamental importance for the institutionalisation of the state policy on the reintegration of released defenders. This regulatory legal act establishes a basic organisational and legal model for managing recovery processes, identifies the actors responsible for policy implementation, sets out procedural algorithms of action, and provides mechanisms for interagency coordination.

Despite the significance of this Resolution of the Cabinet of Ministers, it should be noted that the effectiveness of its implementation will depend on interagency coordination, financial provision, and the introduction of a performance monitoring system, since the absence of unified KPIs and a shortage of human resources may reduce the managerial capacity of the reintegration system.

Subsequently, a more detailed procedure for the implementation of reintegration measures and post-isolation follow-up for released defenders within the systems of the Ministry of Internal Affairs and the Ministry of Defence of Ukraine is regulated by the orders of these ministries, which stipulate that reintegration measures are carried out in specialised departmental reintegration centres. Accordingly, the mission of local self-government bodies in reintegration processes is traced at the stage of post-isolation follow-up («…post-isolation follow-up is a set of measures aimed at consolidating the results of reintegration or post-isolation measures, ensuring full post-isolation adaptation, restoring the physical and mental health of released persons, and providing necessary assistance to their family members…» (Procedure, 2024)).

In order to organise social and professional adaptation of released defenders of Ukraine after discharge, reintegration centres cooperate with social service providers. On issues related to limitations in daily functioning and rehabilitation, cooperation is carried out with local executive authorities and local self-government bodies, social protection agencies, expert teams for assessing an individual's daily functioning, medical advisory commissions, public associations of rehabilitation professionals, and authorised professional self-governing bodies.

The determination of the place of local self-government bodies within the system of actors ensuring the implementation of public policy in the veteran sector, including the reintegration of veterans and, in particular, released defenders, should be examined both through the prism of the decentralisation reform and through the reform of veteran support in Ukraine, which is an integral component of decentralisation.

The important mission of local self-government bodies and the delegation of governmental powers is scientifically substantiated by Z. Hladun as follows: «…although local self-government does not belong to the system of state authorities, being an independent form of public power, within certain limits defined by law, through the delegation of powers of executive authorities, it performs functions of management and regulation of communal property. Acting as authorised public authorities, they govern the socio-cultural life of the respective territorial community, organising and regulating relations in various spheres of life. The executive bodies of local self-government carry out regulatory activities which, depending on their content, acquire the character of either state regulation or local (municipal) regulation» (Hladun, 2006: 441).

In the regulatory domain, the general legal status of local self-government bodies is defined by the Constitution of Ukraine (Constitution, 1996) and the Law of Ukraine «On Local Self-Government in Ukraine» (Draft Law, 1997).

As regards the powers of local self-government bodies in the reintegration of persons released from captivity, following the adoption of the special Law (Act, 2022), paragraph 6 of part 1 of Article 34 of the Law of Ukraine «On Local Self-Government in Ukraine» (Draft Law, 1997), in addition to own (self-governing) powers, was supplemented with delegated powers in this sector: provision of financial assistance to repatriated prisoners of war; facilitation of their employment; organisation of vocational training, retraining, and professional development; and provision of temporary housing.

The problem of delineating and differentiating the powers of local self-government depending on the sphere of state policy implementation is actively discussed by leading experts in the fields of public administration and law. Contemporary decentralisation processes in Ukraine take place under extremely complex conditions of ongoing hostilities and, in our view, should initially be directed at strengthening local self-government institutions through the expansion of the powers of representative bodies of territorial communities.

It appears that a more scientifically substantiated and well-argued approach is the one proposed by the working group led by Ya. Kaziuk in the Concept for delineating and distributing the powers of local self-government and executive authorities (hereinafter -the Concept), according to which all powers are proposed to be normatively differentiated into subtypes, namely: «...Delegated powers aimed at addressing issues of a socio-humanitarian nature, which are divided into subtypes:

– assigned–functions of exercising certain state powers entrusted to executive bodies of local self-government (e.g., social protection programmes);

– transferred–powers to provide mandatory services to relevant groups of the population of Ukraine at the level guaranteed by social standards (e.g., remuneration of teaching staff in general secondary education);

– secured -powers to provide socio-humanitarian services to citizens upon their requests (e.g., preschool and extracurricular education, culture, physical culture and sport);

Own powers aimed at creating and ensuring the living environment of community residents (e.g., local programmes for the development of housing and communal services and settlement благоустрій, local cultural and artistic programmes)....» (Draft Concept, 2023).

In our opinion, the subdivision proposed by the Concept's authors contributes to a better understanding of the content of local self-government powers when designing municipal targeted programmes related to veteran reintegration, in which veterans are recognised both as an important potential resource in community recovery efforts and as a group that needs support and services.

Veterans' livelihoods, including those of defenders released from captivity, are largely determined by the functioning of community support systems, the availability of social resources, and the quality of interpersonal relationships. While some repatriated prisoners of war return to a familiar social environment, others must build life strategies in new socio-economic and psychological conditions, which complicates their transition to civilian life. A significant barrier to reintegration is the experiential gap between military personnel who directly participated in hostilities, experienced captivity, and the civilian population that adapted to wartime conditions in the rear. This asymmetry of lived experience produces social distance and fragmentation of social ties, which negatively affects the effectiveness of social and psychological reintegration processes. Reintegration at the community level promotes social cohesion by integrating veteran support into local development efforts and strengthening institutional capacity.

A similar position is expressed by S. Sivkov, who notes that «…it is precisely local self-government, exercising governance at the territorial level, that has the best opportunities to understand the specific needs of war veterans, analyse the real problems of this category of citizens, and find the most effective ways of their reintegration. Due to their proximity to the community and everyday interaction with the population, local self-government bodies are able to respond promptly to challenges and provide effective social, psychological, and economic support to veterans, facilitating their full return to peaceful life and active participation in the development of local communities…» (Sivkov, 2025: 36).

One of the prerequisites for the effective implementation of public administration functions in the field of veteran reintegration at the municipal level, in our view, is strategic planning developed not only with consideration of the global Sustainable Development Goals up to 2030, but, first and foremost, with consideration of the specifics of the relevant region (a place-based approach). In this regard, we focus on analysing such a competence of local self-government bodies–specifically in the

sphere of reintegration of veterans and released defenders–as the approval of targeted programmes for the development of the relevant administrative-territorial unit (using the example of the Vinnytsia City Territorial Community–hereinafter VCTC).

In our opinion, the development and implementation of an effective community development strategy, sectoral strategies, concepts, programmes, and plans can not only mobilise the entire community's potential to implement specific and clear plans, but also serve as an effective instrument within the mechanism of public administration adapted to contemporary challenges and threats, including full-scale ongoing hostilities. Undoubtedly, public administration in the veteran sector of the VCTC has its own specificity and a certain degree of autonomy at the local level.

The scholarly-theoretical understanding of strategies, concepts, and programmes as regulatory legal acts adopted by state authorities at various levels is doctrinally established in legal science. The authors of the collective monograph «Economic Activity and the Latest Technologies: Current Problems of Regulation under Martial Law» substantiate the thesis that: «…a strategy is based on the foundational principles contained in legal doctrine and on the general purpose embodied in a concept approved as a legal act; it is a document of a strategic nature, limited in time, as it has clearly defined goals and objectives. In essence, it rather resembles a declaration of the state's intentions to achieve desired indicators in a particular sphere of social relations and contains a general plan of action (in certain directions of state development) for a defined period, with a delineation of responsibility zones and functional workload between various state authorities and local self-government bodies…» (Dmytryk & Tokarieva, 2022: 190).

There are different scholarly approaches regarding the theoretical-methodological nature and applied value of strategies, concepts, and programmes adopted within the scope of local self-government powers. The authors of the research «Strategic Planning for the Development of an Amalgamated Territorial Community» define the primary mission of strategic documents adopted by local self-government bodies as achieving qualitative transformations in the economy and social sphere: «…in modern conditions, when opportunities for territorial development based on past achievements have been virtually exhausted, it is important to develop precisely long-term strategic programmes and to implement them consistently….» (Berdanova & Vakulenko, 2017: 17).

The significance of a strategic vision for the development of territorial communities should not be underestimated. Even during the war in Ukraine, new Methodological Recommendations «On the procedure for drafting, approving, implementing, monitoring, and evaluating the implementation of territorial community development strategies» were approved, which formulate the regulatory definition of a territorial community development strategy as: «…a strategic planning document of state regional policy that defines strategic and operational goals and objectives for the sustainable development of a territorial community; it is developed for the period of implementation of the State Strategy for Regional Development and the relevant regional development strategy, taking into account the provisions of the Law of Ukraine «On the Principles of State Regional Policy» (Recommendations, 2020).

I. Boryshkevych and V. Yakubiv assess the territorial community development strategy as one of the most important documents adopted within the competence of local self-government bodies: «…a territorial community development strategy is a long-term plan that outlines the overall vector of actions of local authorities, their partners, representatives of business, education, residents and other stakeholders towards the phased achievement of the set goals, the core vision, and the justification of the existence of the established community mission…» (Boryshkevych & Yakubiv, 2022).

It appears that regional programmes in the field of veteran reintegration, by their orientation, should be qualified as social targeted programmes. The development and purpose of any targeted programme should, first of all, correspond to the priority directions of development of the relevant territorial community as formulated in that community's development strategy.

Since we examine the role of local self-government using the example of the Vinnytsia community, such a document is the Vinnytsia Urban Territorial Community Development Strategy until 2030–Strategy 3.0 (Strategy, 2021) (hereinafter–the Strategy). More detailed sectoral planning, with strategic measures, projects, and changes for the city of Vinnytsia, is presented in the Concept of integrated development of Vinnytsia 2030 (Concept, 2019), which was developed with regard to international sustainable development standards and is linked to regional and state development programmes.

To implement strategic documents, municipal targeted sectoral development programmes are being developed in the Vinnytsia region. Thus, in fulfilment of the Strategy, targeted sectoral development programmes are prepared that include measures facilitating the realisation of veterans' rights and social guarantees, ensuring their ресоціалізація and re-adaptation to civilian life, and supporting their physical, spiritual, and cultural development. Among such programme documents of the Vinnytsia City Council, it is necessary to mention the Comprehensive Programme «Main Directions of Social Policy of the Vinnytsia City Territorial Community for 2022–2026» (Comprehensive Program, 2021) and the Programme for Supporting Defenders of Ukraine, their family members, and families of fallen (deceased) defenders, as well as defenders missing under special circumstances, for 2023–2026 (hereinafter–the Support Programme) (Program, 2023). The Programme defines two priority goals:

1. Support for Defenders of Ukraine that will facilitate their reintegration and return from military service to peaceful life, the maximum realisation of their labour and entrepreneurial potential, as well as support for their family members, families of fallen (deceased) defenders and those missing under special circumstances, and the activation of their participation in the life of the Vinnytsia City Territorial Community, which understands and values the contribution of Defenders of Ukraine to the defence of Ukraine's sovereignty during the Russia–Ukraine war.

2. Consolidation of efforts of executive authorities, local self-government, enterprises, institutions and organisations of various forms of ownership, and civil society institutions aimed at deepening social protection and re-adaptation, and at the joint coordination of available resources to ensure social guarantees for Defenders of Ukraine, their family members, and families of fallen (deceased) defenders and those missing under special circumstances; and creating in society an atmosphere of support and respectful attitudes towards them (Program, 2023).

At the first stage (2025–2027) of implementing the Return Strategy, among a number of state-level tasks, it is also envisaged to develop rehabilitation and reintegration programmes in territorial communities, territorial development programmes for economic recovery and the regional labour market, and to introduce the activities of specialists providing support to war veterans and demobilised persons. Currently, the Vinnytsia community lacks a special programme specifically dedicated to reintegration in the VCTC approved by the City Council; however, the Support Programme contains separate provisions outlining key directions of the City Council's activities for successful reintegration into the local community, including:

– monitoring the level of access to benefits and social guarantees by Defenders of Ukraine and identifying urgent problems and ways to address them;

– ensuring comprehensive social support through vocational retraining, education, employment, and support for starting a business;

– maintaining a favourable moral and psychological state by assisting in the realisation of benefits and social guarantees, resolving social and basic living issues, ensuring quality psychological and legal assistance, and engaging in cultural initiatives held in the community;

– supporting the maintenance of proper health status and a healthy lifestyle;

– forming positive attitudes towards Defenders of Ukraine and conducting national-patriotic events with their participation;

– financial support for civil society institutions whose activities are aimed at improving social protection, rehabilitation, and adaptation of Defenders of Ukraine (Program, 2023).

In our view, given the objectives of the publication, in the context of strengthening community capacity and developing long-term cooperation between civilians and service members returning to the community, the principles of decentralisation and subsidiarity become particularly significant. Delegating powers to local self-government bodies not only brings decision-making closer to citizens, but also directly increases the effectiveness of policy implementation in the sphere of reintegration of defenders of Ukraine, ensuring its adaptability at the local level.

At present, the VCTC has successful experience working with veteran service members who have returned to the community. Having studied advanced national and international experience in the reintegration of former service members, civil society institutions are actively developing in the Vinnytsia region. It is believed that the rehabilitation and return to peaceful life of combatants proceeds best when they gather together in a comfortable, well-equipped space (hub) with a full range of services delivered through a «one-stop shop» model. In the Vinnytsia community, a number of institutions operate effectively in this direction: the Vinnytsia structural unit of the Charitable Organisation «Charitable Foundation «Veteran Hub++»», the NGO «Vinnytsia Analytical and Educational Centre «Veteran Space»», the Vinnytsia Municipal Veteran Space «Pobratyn»; the NGO «Flame of Hope», the NGO «Association of Families «Unbreakable»», the NGO «Svitla-UKRAINE», etc., where Defenders of Ukraine (in addition to state institutions) can also receive social and legal, legal and psychological consultations, physical fitness and wellness services, and services facilitating employment and business start-up.

As a result of the study, it was established that coordinated actions at both the state and municipal levels of governance, with a clear delineation of the powers of local self-government bodies and the strengthening of their functional capacity, will contribute to building communities' ability to integrate veterans alongside such a specific category as repatriated prisoners of war. Existing models of reintegration include:

– reintegration at the community level, which presupposes the leading role of local communities and the involvement of their members, including veterans, in decision-making processes. Integrating veteran support into broader local development strategies strengthens social cohesion, increases local accountability, and enhances the institutional resilience of communities, ensuring their adaptability under conditions of ongoing war and security instability;

– targeted support for veterans, aimed at meeting veterans' specific needs without direct integration into the community. The return of service members to civilian life is accompanied by a wide range of challenges, dominated by psychological difficulties, social maladaptation, economic instability, and problems of professional reorientation and employment. This approach ensures the satisfaction of specific needs and the creation of a comprehensive psychosocial support system, since the need for psychosocial intervention and service provision is of the highest priority.

Each of the proposed reintegration approaches has managerial advantages and challenges. In our opinion, an integrated model combining community-based reintegration of veterans with targeted specialised support can become an optimal format for implementing public policy in the studied area.

Conclusion. Within a multi-level system of public administration, local self-government bodies function as the operational link in implementing the public policy of reintegration of released defenders of Ukraine, acting as key providers of public services and coordinators of intersectoral interaction in the psychological, social, medical, legal, educational, and economic spheres. Their activities ensure the translation of national strategic priorities into local managerial decisions, increase the effectiveness of policy mechanisms, and contribute to achieving sustainable effects of social recovery.

An integrated approach to the reintegration of former service members into civilian life–combining community integration with targeted assistance and ensuring personalised support–can prevent social segregation and the growth of social tensions in society. Combining measures to strengthen community capacity with targeted interventions for veterans creates synergy between approaches and establishes prerequisites for sustainable outcomes at the national level.

To enhance reintegration effectiveness, it is advisable to institutionally implement a community-based approach at the national and local levels of public administration with a clear delineation of the roles of central authorities, local self-government, and civil society. Key elements include integrating reintegration into recovery strategies, systematically engaging communities and veteran organisations, and ensuring financial and technical support from international partners to increase sustainability and social cohesion.

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BACKGROUND TO THE LATEST REFORM OF THE EUROPEAN UNION TREATIES PROPOSED BY THE EUROPEAN PARLIAMENT

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Abstract. The article discusses the latest proposal for reform of the European Union treaties, which was included in the European Parliament resolution of November 2023. However, what constitutes the basis of the narrative are various motives, circumstances and everything that contributed to the proposed vision of the future of the European Union. Therefore, issues such as Brexit, the COVID-19 pandemic, the process of EU enlargement, the financial crisis, declining trust in the European Union, new rivalry between global powers, and the war in Ukraine were all subject to detailed analysis. All of this contributed to the reform proposal presented by the European Parliament. The considerations contained in the text end with the observation that it can be assumed with a great degree of probability that the latest proposal to change the treaties, regardless of its final result, will not end the process of European integration.

Key words: European Union, European treaties, institutional reform, the future of the European Union.

Introduction. On November 22, 2023, the European Parliament voted in favor of a proposal for broad changes to the EU Treaties, including the abolition of the right of veto in the Council of the European Union and the expansion of the European Union's competences in dozens of areas, including by adding new exclusive competences and expanding the scope of shared competences. The European Parliament's proposal (previously supported by the European Parliament's Constitutional Affairs Committee) contains a total of 267 amendments of varying severity. The resolution calling for the amendment of the Treaties was supported by 291 MEPs, 274 voted against, and 44 abstained.

It is worth recalling that the pretext and, at the same time, the starting point for the process of amending the treaties defining the system and organization of the European Union, launched at the end of 2023, was a report by a group of 12 experts appointed by the governments of France and Germany. Although this document does not constitute an official position of the governments of France and Germany, it can be assumed with a high degree of probability that it represents the direction of change preferred by both countries, especially since the group of experts was initiated and selected by Paris and Berlin, and the selected group members did not generally present a pluralism of views on the future of the EU, having a rather clearly defined vision of what they were striving for. The Group of 12 report was therefore unofficial in nature and is perceived as such by the vast majority of Member States, who consider it merely a contribution to a broader discussion. Formally, the report was not the subject of, or even supporting material for, the work of the European Parliament. Nevertheless, along with the results of the Conference on the Future of Europe (J. Barcz, 2021; 4), it was intended – in its own way – to legitimize the initiated process of amending the Treaties, simultaneously demonstrating that there is a certain pressure within the Union to implement specific changes. It should be noted that the practice of appointing expert groups by only two Member States, without inviting the other states, to indicate the desired direction of change in the EU does not contribute to the principle of equal treatment of Member States. Such practice rather indicates a strong belief in the leading role of France and Germany in the Union and the treatment of both countries as the locomotives or engines of integration. Nevertheless, it is worth bearing in mind that the principle of respecting consensus and taking into account the positions of all Member States would support the invitation of experts from all Member States. The minimum requirement was to include a significantly larger number of them. Some Member States are hesitant to point this out, but it seems that most of them, either explicitly or

tacitly, accept the role of the German-French duo as a leading force in the European Union, including in shaping its future development.

The most important changes proposed in the report include: 1) extending the qualified majority voting system in the EU Council to all Community policies, including foreign and security policy. Experts also proposed replacing the current majority requirement (countries supporting a given issue must represent at least 65% of the population and 55% of the member states) with a more easily achievable requirement of 60% of the population and 60% of the member states; 2) unifying the electoral law for the European Parliament across all Member States; 3) increasing the EU budget through new sources of EU revenue: taxes such as a minimum corporate tax or a digital tax, and granting the EU the right to issue common debt; 4) recommending that negotiation chapters with candidate countries be closed by a qualified majority of 4/5 rather than unanimous decision of the Member States; 5) further expanding the catalogue of shared EU competences in the area of freedom, security and justice and cross-border infrastructure.

Differing assessments of the report indicate that it was ostensibly intended to be expert, but in reality, it was intended to provide a supposedly objective and unrelated proposal for treaty reforms, which, however, had long been promoted by the German-French duo. Hence, it is sometimes emphasized that the creation of the Group of 12 and its preparation of the report were purely propaganda and marketing, primarily to ensure that neither Berlin nor Paris were identified as the actual authors of the package of prepared treaty changes, especially since the Group of 12 proposals were ultimately included in a resolution of the European Parliament and are now formally the subject of the initiated process of amending the EU treaties.

In its proposal to amend the EU Treaties, the European Parliament calls for the abolition of the unanimity voting rule in the Council of the European Union in the last remaining areas where it still applies: foreign policy, security, and national defense. Another change is to expand the list of shared competences between the Member States and the Union. It is to include matters relating to security, defense, public health, and forestry. The European Union would, in turn, gain exclusive competence in matters related to the environment and biodiversity, as well as in negotiations on global warming. The adopted recommendations also tighten provisions related to the rule of law, including amending Article 7 of the Treaty on European Union so that a finding of a violation of EU law would almost automatically entail financial consequences for the state against which infringement proceedings are pending. Moreover, the European Parliament's proposals also included establishing the jurisdiction of the Court of Justice of the European Union for all interinstitutional disputes. The proposed amendments also include the establishment of a common policy on the European Union's external borders. It is important to note that while institutional changes reforming the architecture of the European Union receive the most attention, as always, the majority of the 267 amendments concern the axiological sphere. These include, for example, proposals redefining the role of European political parties, redefined as "contributing to shaping European political awareness and expressing the will of the citizens of the Union. European political parties may promote, support, and finance activities aimed at achieving these objectives." The axiological area also includes proposals concerning education, including, in particular, classifying education as a shared competence between the Union and its Member States. If this change is successful, it will mean limiting the legislative activity of Member States in the field of education for the benefit of the European Union. Furthermore, it was assumed that the Union's goal should be to promote cooperation between educational institutions, and it was further indicated that the scope of the Union's activities should include promoting cooperation and cohesion between education systems, while simultaneously ensuring the preservation of cultural traditions and regional diversity. On this occasion, it is worth noting that the proposal for treaty reforms moves away from the statement concerning national identity and differences resulting from the traditions and experiences of individual Member States in favour of a much more shallow concept, detached from the concept of

the state, referring "only" to regional differences, which is a clear and unambiguous cold axiological error, unambiguously indicating the intentions.

The European Parliament's proposal also strengthens the European Parliament's role by granting it the right to initiate legislation and nominate the President of the European Commission, which, according to the proposal, would be renamed the "European Executive." Furthermore, the recommendation would reduce the number of Commissioners to 15, meaning that not every Member State would have a representative on the Commission, as is currently the case.

The procedure for amending the EU Treaties is regulated in detail in Article 48 of the Treaty on European Union. According to this provision, after a proposal for amendments is presented by a Member State's government, the European Commission, or the European Parliament, the Council of the European Union forwards it to the European Council. Amendments are also notified to national parliaments. The latter, in accordance with Article 12(d) of the Treaty on European Union, participate in the procedures for amending the Treaties. As announced by the Spanish Presidency, EU ministers are to discuss the parliamentary report at the General Affairs Council meeting scheduled for December 12.

The ability to amend the Treaty on European Union (TEU) and the Treaty on the Functioning of the European Union (TFEU) is fundamental to the European Union (EU). It allows the EU's legislative and policy framework to adapt to the new challenges it faces. Current procedural arrangements allow for the use of both a standard and a simplified revision procedure. Regardless of the procedure used, EU Member States must adopt amendments to each Treaty unanimously, in accordance with their own, i.e. particular, constitutional solutions provided for the ratification of international agreements. Depending on the Member State, these solutions may be general (and therefore identical for all international agreements), or specific, with their qualified subclass being agreements concluded within the European Union (which is regulated in the so-called European clauses or provisions).

The path to formulating the latest reform. The European Union is practically constantly discussing the desired directions of institutional reforms, which, by the way, justifies the statement that European integration is something that is never finished, something that is always in the *in statu nascendi* phase (D. Rossa-Kilian, 2006; 169).

At least since the reform process accelerated and took a clear direction toward something more than just an international organization, reforms of primary law have been an essential part of the European narrative (Z. Czachór, 2022; 59). Suffice it to recall that the adoption of the Maastricht Treaty in 1992, which formally established the European Union in place of the temporary Communities, did not end the creation of the legal foundations for European integration. It quickly became apparent that Maastricht was neither ambitious nor operational enough, and that further reforms were necessary. These were implemented in the amended versions of the reform treaties adopted shortly thereafter, first in the Treaty of Amsterdam (1997), and later in the Treaty of Nice (2001). The latter formally entered into force in 2003, and immediately afterwards, work began on an even more visionary reform, which was not intended to be just another partial change, but rather to lead to the adoption of an entirely new treaty. It was not hidden from view that this new treaty would be utterly innovative and avant-garde, that it would change the face and pace of integration, and at the same time, give it the hallmark of centripetal integration, consolidating, and even centralizing the European Union.

The intentions of the reformers, who in 2003 embarked on a fundamental overhaul of the EU Treaties, were expressed in the treaty establishing a Constitution for Europe, finally adopted in 2004. Its very name unequivocally expressed the intentions of the creators of the new law. While it was intended to remain a treaty, an international agreement modeled after a classic international organization, it was also intended to establish a constitution for Europe (Constitution pour l'Europe; Constitution for Europe), clearly demonstrating the intention to achieve much more than just another version of the institutional arrangement of a typical international organization. The debate at the time argued that the use of the term "constitution" in the treaty's proper name was

intended to suggest a parastatal perception of the reformed European Union. It was argued in this connection that a special reference was made to the totemic concept of the constitution, which is invariably correlated with the state, and at the same time this concept was transferred to the plane of international law, which was intended to express the intention of "etatization" of the European Union (M. Kruk, 2004; 37, i.e). strengthening its state element, while weakening its international component at the same time, which was all the easier because the European Union had long been treated as an international organization *sui generis*.

Consequently, the treaty adopted in 2004 was intended to be both a treaty (international agreement) and a constitution, symbolically demonstrating the transformation of the union of states into at least a para-state entity (S. Parzymies, 2004; s. 26, i.e). This, among other things, meant that ratification of the treaty establishing a constitution for Europe encountered significant resistance in member states, including Denmark, Ireland, and France. Europeans thus rejected the idea of centralizing the Union and making it excessively similar to a state, a view motivated by, on the one hand, a commitment to the nation-state and, on the other, the need for a clear demarcation between the state and the Union (E. Kużelewska, 2011; 39).

The failure to reach a conclusion on a treaty establishing a constitution for Europe came as a considerable surprise to the European establishment. It was convinced that the adoption of the new Treaty of Rome (the Constitution for Europe, to emphasize its historical significance, was signed in Rome, the very place where the first treaty in European integration was signed) was merely a formality, and that the societies of the Member States had already been adequately primed for a step-change in approach to integration. This was the purpose of concepts such as European identity, a single European space, and, proposed by Jürgen Habermas, the idea of European constitutional patriotism, and simultaneously—correlated with it—a broad propaganda campaign exposing, among other things, the shortcomings of the nation state, the sins of traditional patriotism identified with the existing state, and nationalism (P. de Villiers, 2019; s. 21). Suffice it to recall that the so-called EU newspeak began to be widely adopted in European discourse, which, for example, anathema to the concept of nationalism, but not to imperialism, which—as we know—was the driving force behind 20th-century totalitarianisms. This is one of the reasons why, for some time now, the nation-state has been criticized and sometimes even questioned in the European Union as a supposedly archival and antiquarian construct, while simultaneously fostering a "dream of power" that the European Union is supposed to be, to which the term "empire" is attached, a term that—interestingly—in no way conjures up any negative connotations (J. Zielonka, 2007; *passim*). This same newspeak is slowly changing the rudimentary meaning of conceptual categories such as nation, state, nationalism, and patriotism, to the point that patriotism has become correlated with nationalism, and nationalism, in turn, with autocracy, which has been contrasted with democracy, which supposedly thrives best on the soil of cosmopolitanism, integration, and Europeanization. In this way, a unique set of concepts has been created, which are either met with unequivocal affirmation (Europe, Europeanness, integration, democracy) or condemned as discredited, outdated, archaic, or even dangerous (nation-state, patriotism, nationalism, populism, autocracy). Incidentally, few people realize that this is precisely how a Manichaean vision of the world has been created in European discourse. A unique dualism has been created, around which participants in debates on the future of the European Union are supposed to orient themselves. On one side of this debate, then, are supposed to be progressives, European democrats who invariably resort to the slogan "more integration." On the other side are supposed to be variously hued orthodox populists, nationalists, and autocrats. In this primitive and oversimplified convention, some are supposed to be supporters of the European Union, whatever it may be, while others are supposed to be anti-European and anti-EU troublemakers, at best misunderstanding historical processes, and at worst cynics or even agents putting a stick in the spokes of the bicycle that is European integration. The bicycle parallel here is not coincidental. For a long time, a belief expressed

by Jacques Delors, that European integration is like riding a bicycle, has persisted among acolytes of tightening European integration, that European integration is like riding a bicycle, and that this means that if we stop it, the entire European project will simply topple over.

The set of rhetorical and stylistic devices developed during the discussion on the European Constitution has only deepened over time. The obligatory dualism of attitudes towards the European Union has been supplemented by such incantations as rule of law, climate, ecology, abortion, and gender. These are the additional focus of the discussion on the past of Europe and the European Union, according to the idea that unconditional support for these ideas signifies Europeanness, progress, and democracy, while resistance, or merely major or minor reservations or explanations, positions the interlocutor as, by definition, an opponent of integration, a populist, a demagogue, an anti-democrat, a supporter of the *ancien régime*, etc.

The war in Ukraine, which erupted in February 2022, added a new layer of arguments to this Manichaean approach, simultaneously equating the European Union with Europe in general. This was clearly evident in the spring 2024 European Parliament elections, when the Brussels elite's strategy proposed making the war and related issues an additional dividing line. According to this strategy, those who nuance the assessment of the war in Ukraine are "anti-Europe." Those who point out the ambiguity of the interests and goals of the parties involved in the conflict are "anti-Europe." Those who are insufficiently engaged in aid for Ukraine are "against Europe." Needless to say, all those who are "against Europe" are supporters or even agents of Vladimir Putin, populists, nationalists, anti-Europeans, enemies of integration, and opponents of Europe (the European Union) becoming an empire. In this way, EU newspeak has broadened the concept of the European Union, practically identifying it with Europe and its democratic liberal values, while simultaneously contrasting it with what is no longer Europe, what is not Western civilization, what is not democracy, what is not progress, and what sums up all their antonyms. Paradoxically, the war in Ukraine is significant not only from the perspective of the EU's newly created instruments of action (e.g., in the area of common foreign and security policy), but also has a much broader narrative and propaganda significance. It has become one of the most important motivations for efforts to so-called strengthen the Union, one of the most important means of which is the initiated amendment of the EU treaties.

To catalogue other motives that ultimately contributed to the latest reform of the European Union, one can point to, for example: 1) Brexit, i.e. the unprecedented withdrawal of one of the Member States from the Union; 2) the COVID-19 pandemic, which has changed the approach to rapid response to unpredictable events and situations, while demonstrating the importance of citizens' health security; 3) the launched process aimed at the accession of new Member States, which will culminate in a significant enlargement of the European Union, which in turn may bring turbulence to its smooth operation; 4) new challenges in global geopolitics (the situation in the USA and China and the tensions between these two countries); 5) the rise of the so-called middle powers, which require an appropriate response from the European Union; 6) the so-called rule of law crisis in some Member States, which has generated unconventional actions by the European Union, in some cases even described as ultra vires actions; 7) practical changes in the way the European Union functions, which have often been responsive to stimuli coming from the environment (in the area of health, safety, supplies of raw materials, energy, etc.); 8) changes in the human natural environment (climate and the effects caused by its change); 9) the EU's financial problems, which occurred on a largest scale shortly after the adoption of the Lisbon Treaty and which have been dubbed the "financial crisis", which consumed the Union and some Member States for the next decade, requiring appropriate measures (K. Żukrowska, 2012; 73); 10) falling trust in the European Union among citizens of the Member States (D. Pastarmadzhieva, M. Angelova, 2021; 19), which, together with the Union's perennial democratic deficit, significantly lowers the Union's social rating and means that in most cases it is still the Member States that are subject to the so-called first identification.

A separate motive, it seems, was the determination to complete the treaty-based construction of a strong Union after the failure to reach a conclusion on a treaty establishing a constitution for Europe. The false start to the adoption of a constitution for Europe was a kind of trauma for the establishment, which was clearly surprised by such strong resistance from the societies of the Member States (R. Piotrowski, 2023; 219, 220). The subsequent Treaty of Lisbon of 2007 was, in a sense, a prosthetic constitution for Europe, largely drawing on the solutions contained in the treaty signed in Rome in 2004. However, for formal, but also symbolic reasons, it could not serve as a proper constitution for Europe, which was discredited, for example, in the French referendum (E. Kużelewska, 2010; 70). In the eyes of many ardent acolytes of stronger, deeper, and faster integration, this was a colossal failure of the European project. Hence, the Brussels establishment was even labeled the orphans of the failed European constitution, which translated into at least some of the Union's actual actions, which were carried out as if the European constitution were actually in force, or at least intended to be. On this occasion, views were even formulated that the European integration project was ripe for a new incarnation, but unfortunately, Europeans were not. They continue to create a demos at the level of individual states but are unable to create a unified society at the continental level. Expanding on this view, it was also argued that a gap exists, and is even deepening, between European elites and Europeans, that the former see and understand more, while the latter are limited to the narrow perspective of their own country. All these issues were reduced to the fundamental question of European identity and its nature in the context of further integration (M. Bachryj-Krzywaźnia, 2024; 297).

Over time, pressure to amend the European Union's primary law grew. There was also a growing conviction that, in the face of so-called right-wing populisms, as right-wing conservative governments in some Member States were pejoratively referred to, the integration process needed to be accelerated and, in its own way, made irreversible. Concern about public sentiment, which increasingly criticized at least some EU policies (migration policy and climate policy), also played a significant role, leading to a diminishing belief that the vision of the European Union as a strong European empire was the only correct one. Voices were increasingly heard that the Union should return to its roots, that it should focus on strictly economic issues that generate prosperity and well-being, while leaving axiological, ideological, political, and ideological matters to the Member States. This was especially true because the so-called rule of law dispute demonstrated the European Union's considerable political, and even ideological, commitment, which was not always met with acceptance. It was also often argued that the dispute over the rule of law gave EU institutions and Brussels elites additional impetus to further entangle the integration process axiologically. This, from the very beginning, was a clearly pro-integration move, driving factual changes that were then intended to be formally confirmed. The concept of a kind of "axiologization" of the European Union was even adopted as a perhaps attractive and, above all, most effective way to achieve stronger integration (A.-M. Le Pourhiet, 2024; 21). This meant focusing on the layer of so-called European values, which were to create a common and coherent space, based on which the legal orders of the member states would be even more unified, which would, in a sense, naturally force their deeper integration. It is worth noting that on the margin of the aforementioned "axiologization" process, the issue of the primacy of European law, including its primacy over the national constitutions of the Member States (P. Ruczkowski, 2018; s. 134), was revived, which was done on the margin of the dispute over the so-called rule of law, in a sense reactivating the dispute that seemed to have been resolved earlier (M. Muszyński, 2022; 5).

Responsiveness to public sentiment and expectations was undoubtedly a key determinant of the treaty amendment process. Hence, the EU had already undertaken actions intended to build the social foundations for reforms, which, among many other reasons, also provided a basis for legitimizing them. Hence, the idea of organizing a conference on the future of Europe emerged, which was explicitly described as a great European debate on the future of the European Union. The conference was, in essence, a year-long joint venture of the European Parliament, the Council of the EU, and the European

Commission, during which Europeans were to debate the challenges, priorities, and future shape of the European Union. The conference, its original sin, significantly limited the role of Member States, including, for example, their parliaments, which were formally excluded and assigned only a modest role as dialogue formats for so-called civil society organizations in individual Member States, without the ability to formulate their own binding conclusions, comments, or opinions (R. Wąsowicz, 2021; 1-4). Another sin of the conference was the de facto limitation of the debate, with the stipulation that it excluded voices that were overly critical, populist, xenophobic, racist, nationalist, or generally questioning EU policies. This, on the one hand, corresponded to the newspeak and dominant EU narrative, and, on the other, positioned the conference as a debate for acolytes of an a priori established vision of the future, defined as "more Europe." The conference can therefore be seen, at least in part, as a marketing ploy intended to cushion future treaty changes against social resistance, which was indeed feared and perceived as a recurrence of the period when the European Constitution was ratified. Thanks to the conference, the European establishment could openly indicate that the proposed reform was nothing more than a response to "social expectations, voices, demands, and conclusions," and at the same time an expression of a well-functioning "European democracy." The conference results clearly confirmed that "Europeans want to be more involved in shaping decisions and policies at the European level," that Europeans monitor the rule of law in all EU countries and have adopted a new rule of law framework," that Europeans support "multilateralism and a rules-based international order," that Europeans "want a modern migration and asylum system, border management, cooperation with partner countries and the fight against migrant smuggling," and "protection of people fleeing violence and the integration of newcomers into society."

Undoubtedly, launching the Conference on the Future of Europe, as a kind of study on future treaty amendments, was intended to address several issues. First, bearing in mind the experience of the failed ratification of the Constitution for Europe, it engaged Europeans at the pre-initiative stage. This, secondly, democratized and legitimized the treaty amendment process, eliminating the accusation of a lack of democratic legitimacy for the Union as such, while praxiologically cushioning any subsequent resistance from member states, as the revised treaty, according to the narrative, was intended to address the expectations and needs of Europeans, not those of a mythical Brussels establishment. Thirdly, the conference proceedings skillfully steered the discussion, which was not entirely loose or free, as evidenced by its structuring on specific topics such as climate change, the EU in the world, values and rights, the rule of law, and, for example, European democracy. Fourthly, the conference was a great opportunity to impose a specific narrative on what the Union should look like, what it should be, and at the same time to contrast those who strive for a better, stronger, or more modern Europe with all those who, for various reasons, are anti-European, are opponents of integration, or just – far-reaching skeptics – which, according to the adopted rhetoric, also eliminates them from serious discussion, because in the face of the challenges facing the European Union, the only sensible scenario for the future is further, more, and stronger.

Undoubtedly, a significant backdrop to the launched treaty amendment procedure was, generally speaking, the climate surrounding the need to reform the European Union and, particularly among European politicians, broader discussions about the optimal shape of a revised or reformed Union (A. Wielomski, 2024; 15 i.e.). President Emmanuel Macorn was particularly involved in this regard, repeatedly presenting his own ideas for modernizing the Union, pointing to the need for further integration, strengthening the Union, moving towards deeper integration, and making the European Union a global player (J. Szymanek, 2022; 233). We should also keep in mind German ideas, most fully expressed in the 2021 coalition agreement founding Olaf Scholz's government. This agreement contains the most comprehensive German integration concept to date. The coalition partners explicitly acknowledged the need to strive for "strengthening integration and transforming the EU into a federation based on the principles of decentralization and subsidiarity." They also announced

"taking action to implement further EU reforms. These should lead to the creation and development of a European federal state, built on the values enshrined in the Treaties, especially the Charter of Fundamental Rights." The coalition agreement further stated that "Germany, as the largest member state of the Union, assumes a special responsibility for maintaining the cohesion of the European Union and determining its potential direction of development." (K. Dunaj, 2021;. 2). In this context, the programmatic agreement of the German parties highlighted the need to address such momentous challenges of our time as climate change, digitalization, and the preservation of democracy. The parties forming the government in Berlin clearly stated that they "support a form of Union that recognizes its values (especially the rule of law) and is able to defend them resolutely, both internally and externally." The German coalition agreement of 2021 clearly focused on two things: the European Union's consistent pursuit of a "European federal state" and its reliance on values (freedom, the rule of law, democracy) as the binding force of such a "European federal state."

An intense debate on the political system has been conducted especially since Brexit, which was undoubtedly an unprecedented event for the European Union, significantly changing the perception of the Union, which resulted in speculations about other possible exits, which had a marketing impact on the Union, which, due to Brexit, had undoubtedly lost its attractiveness (until then it was an organization that everyone wanted to join, and from that moment on, a possible exit from the Union also became an issue to be taken into account). The post-Brexit period also brought with it additional events and processes that were grist to the mill of all those advocating for the need for reform of the European Union. Suffice it to mention the COVID-19 pandemic, the so-called rule of law crisis, which sparked an explosion of questions about EU values, and finally—last but not least—the latest war in Ukraine. All of these created the belief that "the scale of the challenges associated with the necessary reform of the EU system is enormous." (J. Barcz, 2024; 15) This belief was the fundamental backdrop for the treaty revision procedure launched at the end of 2023. This was especially true given the frequent addition of the claim that the EU was supposedly in crisis, requiring bold and daring reforms that would allow the European Union to adapt to new challenges (D. Kabat-Rudnicka, 2024; 57).

However, when considering the context of the reform, one more crucial element should be kept in mind: the need to formalize solutions that were developed in practice under the Lisbon Treaty. The European Union, like perhaps no other organization, operates not only on the basis of de lege late legal regulations but also on everything defined as practice. This practice, exceptionally rich in the EU context, has even been dubbed "competence creep," which in many cases means that the classic set of competences distributed between the EU and the Member States (i.e., exclusive competences of the Member States, shared competences, and exclusive competences of the EU) is supplemented by competences "trodden down" or "wrestled away" by the European Union. The issue of progressive competences is not new. Practically from the outset, the structures of integrating Europe have employed such instruments, primarily to achieve higher or more abstract goals of the Communities and, later, the Union. They have always been met with a variety of assessments, ranging from approval, through ambivalence, to unequivocal condemnation, even indicating that such practices are *contra legem* and *ultra vires*.

Sometimes they were justified by "invisible" rules of operation and goals, primarily integration, which they were intended to serve. At other times, the concept of so-called "creative flexibility" was employed, i.e., maximizing the potential of the treaties, which was intended to adapt the provisions of primary law to current needs. It seems that this "creative flexibility" cannot be ignored when drawing the background to the latest treaty changes. This is especially true because in the case of most new treaties founding the European Union's legal order, a significant portion of their provisions are not so much a manifestation of theoretical concepts and the formulation of a priori visions, but rather the introduction of solutions that, to a greater or lesser extent, had already been practiced before. Therefore, treaty revisions, to a large extent, record earlier changes or their incipient stages.

The European Parliament resolution of 22 November 2023 on the proposals for amending the Treaties sets out the reasons for the reforms expressly. It points out that the current version of the Treaties entered into force on 1 December 2009 and that since then the European Union has faced, and continues to face, unprecedented challenges and numerous crises, in particular Russia's aggressive war against Ukraine. It further argued that treaty changes are necessary not as an end in themselves, but in the interests of all EU citizens, as these changes are intended to transform the Union, increasing its capacity to act and strengthening its democratic legitimacy and accountability. It added that they should enable the Union to address geopolitical challenges more effectively. The future geographical enlargement of the European Union was also cited as a reason for the change, arguing that the Union's institutional framework, and in particular its decision-making process, especially in the Council, are barely sufficient for a Union of 27 Member States. Therefore, with the prospect of future enlargements in mind, treaty reform becomes both necessary and inevitable. The authors of the proposed amendments also cited the Conference on the Future of Europe in their motivations, explicitly mentioning the conference's conclusions and the fact that they contained 49 proposals and 326 measures, many of which could only be implemented through treaty amendments. It was also added, albeit implicitly, that the conference conclusions were a democratic and democratizing element of the Union, as they de facto conveyed the direction of the Union's changes to its citizens.

Conclusion. The ongoing debates on the need for institutional change in the European Union are a constant element of the dispute between those who want deeper and faster integration and those who advocate maintaining the status quo, recognizing that the European Union has achieved an optimal or even satisfactory shape, establishing a balance between the need for cooperation in an increasingly globalized world and the need for the nation-state. It is pointed out that the nation-state remains a fundamental conceptual category even for those who predict its demise and promote ideas for increasingly ambitious integration. Integration maximalists strive for the emergence of a "European superstate," a "European empire," a "United States of Europe," "one great European state," and so on. It is therefore somewhat paradoxical that this integration narrative, while questioning the rationale behind the existence of the nation-state, still employs the category of the state (P. Grudziński, 2024; 101). The proposed alternative to the Member States therefore takes the form of a collection in which the state occupies a central place, even though in public debate this very state is very often the subject of criticism, even condemnation. Projects for federations, confederations, or a single European state constantly employ the concept of the state. Therefore, a more or less federalized state constantly looms on the horizon of treaty changes. Even the most ardent acolytes of European unity, ergo critics of the nation-state, do not hide the fact that their goal is to construct a strong European power, state, or empire, albeit one that is not correlated with the existing nation-states but is situated above them (J. Ruszkowski, 2015; 17).

For these reasons, it seems that the latest treaty amendment procedure, formally launched in November 2023, will not end the dispute over the future of the European Union. Regardless of its outcome, Europe will continue to face dilemmas over choosing the optimal development path. There will also be a continuing dispute between those who support the idea of "more Europe" and those who are more likely to support the idea of "enough Europe," assuming that the European project only makes sense when it skillfully combines the need for the traditional nation state with the need for supranational cooperation. Therefore, every amendment to the Treaties is perceived, on the one hand, as necessary or desirable, and on the other as a threat to the nation state (A. Grzesik-Robak, 2007; 34). In reality, however, every amendment to the Treaties changes the grammar of the relationship between the Member States and the European Union. Experience shows that every amendment to the Treaties does not so much diminish the role and importance of the state, but rather shifts the category of state from the Member States to the European Union.

It is highly probable that the latest treaty amendment, regardless of its final outcome, will not end the process of European integration. Sooner or later, new proposals and new themes will emerge, arguing for another, major or minor, revision of EU law. Understandably, new themes will emerge, but they will also include persistent themes, such as the need to build greater resilience within the Union, the need to address new challenges, the need to respond to the crisis, and the requirement to ensure greater efficiency, functionality, and democracy. Another constant theme will likely be the need to balance the state element within the Member States and the state element within the European Union. The latter, whether an international organization or a parastate, is undoubtedly a sui generis creation and will remain so for a long time.

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ROLE OF SCHOOLS IN THE US IN RAISING AWARENESS OF MMIW

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Abstract. This paper examines the significance of schools in raising awareness of the ongoing Missing and Murdered Indigenous Women (MMIW) issue. The paper uses a qualitative, literature-based analysis to argue that schools are positioned to facilitate empathy, civic responsibility, and cultural understanding during the critical stage of social development. The study suggests several educational approaches to integrate students with local communities, including storytelling projects, community awareness initiatives, symbolic art displays, and the inclusion of authentic Indigenous perspectives in curriculum frameworks.

This study's analysis also indicates that supporting critical thinking and social justice awareness can be achieved by respecting the Indigenous knowledge system. The inclusion of MMIW issues in curricula allows schools to contribute and to engage in meaningful dialogue and actions towards the respect, dignity, and visibility of Indigenous women and girls.

Key words: Missing and Murdered Indigenous Women (MMIW), Native American education, culturally responsive education, curriculum integrations, social justice education.

Introduction. According to reports, Missing and Murdered Indigenous Women (MMIW) is one of the main crises that affects Indigenous women in North America due to the high rates of violence and systemic neglect over many years (Issues | Indian Law Resource Center, 2017). Research by the National Indigenous Women's Resource Center (NIWRC) (2022) indicates that, for many years, federal legislation has restricted and constrained Tribal law enforcement's ability in the prevention of non-Native crimes.

The National Inquiry's Final Report (2019) shows that the MMIW cause is a result of a combination of societal injustices, cultural and linguistic erasure, and long-standing human rights violations related to historical and persistent violence. In order to comprehend the historical and contemporary realities of American Indian Nations and their women, mainstream American education can be addressed through changes. The necessary adjustments at the national state and national levels can be guided by this two-pronged process of legal reform and cultural reeducation (NIWRC, 2022). Schools can help foster activism and understanding of these concerns through education. As organizations that shape and influence values, educational institutions serve as essential tools for students to understand the nuances of MMIW, develop cross-cultural empathy, and engage actively in justice and equity concerns. Schools are positioned to empower youth by integrating authentic Native American history, voices, and perspectives into curricula, supporting storytelling programs, and supporting community-driven projects.

Literature Review. Most of the research dedicated to Missing and Murdered Indigenous Women (MMIW) mainly focuses on systemic gaps, social and political violence against Indigenous people. However, there is very little focus on educational frameworks that could serve as tools for engagement opportunities. Schools' role in this process is not neutral. They can function as sites for developing critical consciousness and culturally grounded understandings of social injustice.

According to Held (2023), Western educational settings, which have long served as a standard, support dominant systems and their curricula, policies, methodologies, and data interpretations, all

of which reflect those biases. Therefore, Native American knowledge systems and sociopolitical issues have been neglected. Scholars McCarty and Lee (2014) argued that the concepts of Culturally Sustaining and Regenerative Pedagogy (CSRP) can serve as an essential strategy for Indigenous learners, positioning Indigenous knowledge not as an alternative but as a fundamental part of education (McCarty & Lee, 2014). Thus, culturally relevant pedagogy addresses colonial issues and develops community-based educational sovereignty.

According to studies (Heybach, 2016), culturally responsive education, which incorporates students' cultural identities, fosters sociopolitical awareness. Those responses honor Native American history, cultures, and tribal languages. Consistent with Turanovic and Pratt (2017), the MMIW epidemic highlights the importance of education, as the Indigenous youth who were exposed to violence face an increased risk of negative consequences in early adulthood.

Another article about the school in raising awareness about the Missing and Murdered Indigenous Women (MMIW) epidemic was written by two student activists, Isaacs and Young (2019). They suggest that lived experiences, students, and educators can serve as advocates and raise awareness about this crisis, not only within the school but also outside. Nevertheless, this study is narrow in scope and does not address gaps in the educational context or how learners can raise awareness of MMIW.

Schools can play not only an educational role, but can also shape students' perspectives on sociopolitical patterns. Although the following study does not directly align with the ideology of addressing MMIW in existing papers, it explains how Indigenous students also take initiatives to resist cultural erasure by protest, community mobilization, and cultural expression (Turner et al. 2023).

The following are examples of scholarship that can easily be adapted to an educational setting as well. The REDress project, a public art installation, also aims to raise awareness of the MMIW epidemic (The Guardian, 2019). This project was established by Metis artist Jaime Black, who visually represents the scale of the crisis and emotionally resonates with it. By incorporating installations into schools, educators invite students to engage in critical conversations about gender-based violence, Indigenous cultural erasure, colonial consequences, and fostering awareness that extends beyond the classroom (Davis, 2018). Analogically, the project Walking With Our Sisters (2020) was also established to honor the victims by creating moccasin tops. These projects demonstrate the power of symbolic methods that are oriented to the community for encouraging the recognition of violence against Indigenous women and girls and its outcomes.

Indigenous scholar Waziyatawin (n.d) emphasized the importance of decolonizing education. Although her work and findings are foundational for shaping Native American experiences, there is still a lack of educational provision for implementing decolonial theory in research-driven evaluations of classroom-based MMIW initiatives.

Despite these studies, contributions, and student activists, there are still existing gaps in the educational framework that is dedicated to systemic violence against Indigenous women and girls. However, it shows that pedagogical methods can be used alongside the MMIW situation to confront the colonial violence.

Methodology. This study examines the role of schools in addressing MMIW using a qualitative, literature-based methodology. Creswell and Poth (2018) argue that since this method emphasizes understanding the social, political, and cultural aspects of education, it is consistent with qualitative methodology. To identify recurrent themes and gaps, such as the methodical incorporation of MMIW-related content into curricula, the study synthesizes evidence from peer-reviewed literature on Indigenous education, culturally responsive and culturally sustaining pedagogy, student and youth activism, and documented school-based initiatives. To understand how schools might promote student participation, empathy, and social justice awareness, the education-based examples were provided.

The following research combined data from multiple sources through a thematic, critical, and pedagogical lens to identify recurring themes, including student activism, cultural symbolism, com-

munity involvement, and curricular integration. Patton (2015) stated that critical qualitative methods emphasize understanding the social, political, and cultural facets of education. Moreover, the study used thematic synthesis to explore how schools may be places of empathy and social justice awareness, and it highlights gaps in the literature, particularly in the systemic integration of MMIW awareness into curricula.

Findings and Analysis.

A. Student Activism and Civic Engagement

School-based activism shows that schools can serve as contentious political settings where students directly engage with social responsibility. According to AP News (2023), one of these examples was the high school walkout in Sioux Falls, South Dakota, which protested to raise awareness of social injustices and to show how schools can serve as places of civic education, with students engaging in community lobbying and negotiating institutional authority. However, this walkout was not developed within the educational framework as part of the curriculum or pedagogy, nor was it used as an educational tool. The Sioux Falls walkout remains the act of student activism that was led by a sense of injustice and jurisdictional challenges that frequently prevent prompt investigations into MMIW cases, which show disregard for Indigenous people. Freire (1970/2000) stated that critical pedagogy exemplifies praxis, combining reflection and action to challenge oppressive structures and cultivate social consciousness.

B. Cultural Symbolism at Schools

Some symbolic activities at schools, such as visual and performative rituals, may serve an educational purpose by raising awareness of MMIW issues. For example, during the basketball memorial, Omaha Tribe cheerleaders used red handprints over Indigenous students' mouths to both educate the larger school community about the issue and convey the silencing of Indigenous women (Barron, 2020).

These activities improve students' learning and identity development. As they engage in them, students gain empathy for people impacted by MMIW, interact with Indigenous knowledge systems, and hear collective stories of survival.

C. Curriculum Integration and Interdisciplinary Approaches

Schools can further translate awareness into structured learning by integrating curriculum and engaging in interdisciplinary instruction. According to Indian Education for All (n.d.), every public school in Montana should provide students with education about the state's Indigenous peoples and require a curriculum developed with tribal governments. This is one example of Indigenous-related education reflected in the curriculum. Another example is the Comox Valley School in British Columbia, a high school curriculum implemented by Lees and McMahon (n.d.) that provides information about MMIW. These methods demonstrate how educational institutions can turn complex societal issues into visible learning opportunities.

From an educational perspective, these strategies represent critical pedagogy and culturally responsive teaching, showing how education may be multidisciplinary, action-oriented, and closely linked to students' cultural backgrounds (Heybach, 2016; Freire, 1970/2000).

Challenges and Limitations. Even though school can be a potentially strong tool in raising awareness of MMIW, there are still existing challenges and limitations that can restrict the effectiveness of actions.

Significant limitations can arise when teachers are not trained on Indigenous peoples, and without adequate preparation, they are insufficiently prepared to address the issues of MMIW (Lorenz, 2019). Lorenz indicates that this is a serious problem in classrooms since non-Indigenous educators might be unintentionally engaging in racist macroaggressions at work or even harboring stereotypes when educating Indigenous students.

On the other hand, when Indigenous issues such as MMIW are being told from the perspective of victimhood only, their society will be linked to passivity (Fan, 2024). This statement explains that the

MMIW issue does not occur because of the Indigenous people being victims, but because of the systemic failures. Emily Fan (2024) stated that when Indigenous voices are confined to discussions from a bygone age, the lack of relevant modern narratives about Indigenous people inevitably harms both Indigenous and non-Indigenous students. Educational curriculum should not be using Indigenous voices of women and girls as an accessory, which is included in ways that serve institutional priorities rather than Indigenous communities.

Another challenge can occur if the school entirely relies on symbolic activities such as murals or any other related art projects that don't make long-term changes in the teaching. When schools focus on what is performative, rather than impactful, the integrations stay absent and the commitments superficial (Gibbs et al., 2023).

Recommendations. McCarty and Brayboy (2021) suggested that schools should respectfully integrate and maintain students' culture and issues. However, it's not just about adding facts about cultures and problems, but genuinely supporting the students' backgrounds. In Indigenous educational contexts, it requires focusing on Native American cultures, languages, and systemic failures that further led to issues such as MMIW (Ladson-Billings, 2009).

Second, education policy at the district, state, and national levels should include mandates for culturally responsive curriculum and teacher training programs that would encompass Native American histories, culture, contemporary experiences, including the MMIW crisis.

Moreover, classrooms should collaborate with local Indigenous leaders, advocates, activists, or MMIW survivors. Inviting those individuals to share their stories and perspectives provides students with experiential learning opportunities that would develop empathy and gain a nuanced understanding of the MMIW problem. Tuck and Yang (2012) stated that schools should be using authentic Indigenous voices for developing curriculum and lessons to ensure accuracy.

However, teachers should understand that education about the MMIW problem should be trauma-informed and avoid framing Indigenous people as victims. Instead, the teaching should honor resilience, systemic equity, and human rights across diverse disciplines. Therefore, schools need to be a safe place and respect students' emotional safety by implementing trauma-sensitive pedagogy (Bearhead, 2020).

Another way for schools to raise awareness about MMIW is not to focus on a single subject but to develop a holistic understanding (Indian Education for All, n.d.; Davis, 2018).

In sum, schools that adopt culturally responsive pedagogy, and the Native American community are engaged, can help students to develop an understanding of the social and systemic injustices. Through collaborative classroom practice, students can gain knowledge about the Native American realities as well as the MMIW problems.

Conclusion. Educational institutions can be used as an essential tool in preventing and eliminating violence against Native American women and girls by raising awareness. When schools support student-led activism and Indigenous-centered practices, they contribute not only to awareness but to the development of critical consciousness, civic agency, and collective responsibility among youth. Schools can bring public understanding about the Missing and Murdered Indigenous Women by bringing empathy, adequate, and culturally accurate teaching. At the same time, this analysis includes challenges that require increased precision and attention to avoid fostering a colonial way of thinking. Therefore, this research would provide evidence-based guidance for educators and policymakers to create inclusive, just-oriented educational environments.

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EMOTIONAL INTELLIGENCE AS A STRUCTURAL COMPONENT OF MODERN MILITARY TRAINING

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Abstract. In this study, the authors analyze emotional intelligence as a structural component of modern military training in the context of growing demands on the professional, psychological, and managerial readiness of military personnel. The relevance of the topic is determined by transformations in the security environment, the increased level of psycho-emotional stress of military service, and the need to develop the ability of military personnel to effectively lead, self-regulate, and interact with others. The study uses systematic, personality-oriented, and psychological approaches, as well as methods of theoretical analysis, generalization, and interpretation of scientific sources. It has been established that emotional intelligence is an integral structural component of modern military training, which integrates cognitive, emotional-volitional, and socio-psychological components of professional competence, ensures psychological stability, the effectiveness of management decisions, and the maintenance of the moral and psychological state of personnel.

Key words: emotional intelligence, officers, higher education institutions, psychological approaches, military personnel, military service.

Introduction. The formation of leadership qualities in students of military educational institutions is considered in scientific discourse as a complex, multi-component process that encompasses the development of the cognitive, emotional-volitional, communicative, motivational, and organizational spheres of the personality. Researchers emphasize that the formation of an officer as a leader is determined by the interaction of the individual psychological characteristics of a future military serviceman with the conditions and opportunities of the military educational environment, which creates space for acquiring managerial experience, forming professionally significant qualities, and developing emotional intelligence as the basis for effective military leadership. The development of emotional intelligence in future officers is particularly important given the specific nature of their professional activities, which involve performing managerial functions, leading subordinates, making responsible decisions in complex, non-standard, and extreme conditions, as well as bearing high responsibility for the lives and safety of personnel. Military service is associated with constant psycho-emotional stress, the need to quickly adapt to changing situations, maintain inner balance, and maintain moral and psychological stability, both for oneself and for subordinates. In this context, emotional intelligence is not an additional but a systemic component of modern military training, ensuring the effectiveness of professional activities, the quality of management decisions, and the ability to constructively

The purpose of the study is to provide a theoretical justification for emotional intelligence as a

structural component of modern military training and to determine its role in the formation of professional readiness, psychological resilience, and effective military leadership in conditions of increased stress and uncertainty.

Main part. The main tasks of the study are to define emotional intelligence; characterize the psychological features of military service that determine the objective need for the development of emotional intelligence in military personnel; and determine the role of emotional intelligence in the formation of leadership qualities in military personnel. The problem of studying the functions of emotional intelligence in the process of professional self-determination of an individual in adulthood is reflected in the studies of O. Bandurka, I. Garna, M. Damirli, O. Dzhuzha, S. Mosionza, O. Malinovska, V. Olefir, Yu. Rymarenko, S. B. Chekhovich, and others.

Analysis of scientific research suggests that, unlike IQ scores, emotional intelligence is largely determined by the individual's own efforts and can be developed throughout life. While IQ is generally considered a relatively stable, genetically determined characteristic, emotional intelligence (EI) is dynamic in nature and is shaped by learning, social experience, professional activity, and reflection on one's own emotional and behavioral manifestations.

In scientific research, emotional intelligence is interpreted as a multi-component construct, the structure of which reflects various aspects of a person's mental and social activity. In particular, within the cognitive approach developed by J. Mayer and P. Salovey, emotional intelligence is viewed as a system of abilities to perceive, understand, analyze, and use emotional information in thinking and decision-making processes. This component focuses on the intellectual processing of emotions and their role in cognitive activity.

The emotional component, presented in D. Goleman's concept, focuses on the ability of a person to be aware of their own emotions, regulate them, maintain internal motivation, and effectively manage emotional states in various life and professional situations. In this approach, emotional intelligence is closely linked to leadership, self-control, and psychological resilience.

The interpersonal or social component of emotional intelligence, which is elaborated in detail in the works of D. Lucin, encompasses the ability to understand other people's emotions, show empathy, build productive interactions, and maintain constructive social relationships. An important addition to this structure is the adaptive component presented in R. Bar-On's model, which emphasizes the role of emotional intelligence in the processes of social adaptation, stress management, and effective functioning in changing environmental conditions.

As noted by O. Kuleshova and V. Lavrovska (Kuleshova, Lavrovska, 2025): “The emotional intelligence of a future officer is manifested in the ability to be aware of one's own emotional states, control them in stressful situations, respond appropriately to the emotions of others, show empathy, maintain a psychologically healthy climate in the unit, and prevent destructive manifestations in interpersonal relationships.” These qualities are essential for maintaining the combat readiness of the unit, building trust between the commander and subordinates, and effectively performing combat missions. In today's world, where military activities are increasingly taking place in conditions of information uncertainty, hybrid threats, and increased psychological pressure, the importance of emotional intelligence as a resource for professional resilience is growing significantly.

An important prerequisite for integrating emotional intelligence into the military training system is the regulatory and legal framework governing the activities of higher military educational institutions in Ukraine. It is based on the provisions of the Constitution of Ukraine, the laws of Ukraine “On Education,” “On Higher Education,” “On National Security of Ukraine,” “On Defense of Ukraine,” as well as on subordinate regulatory acts of the Ministry of Defense of Ukraine and other central executive bodies. These documents define the strategic guidelines for the development of military education, its goals, content, and principles of organization, creating a legal framework for the modernization of military training in line with contemporary challenges.

The Law of Ukraine "On Education" considers education as the basis for the intellectual, spiritual, physical, and cultural development of individuals and society, emphasizing the formation of a set of competencies in students that are necessary for successful socialization and professional realization. In the context of military education, this provision is particularly important, as it provides for the training not only of specialists with a high level of professional knowledge and skills, but also of individuals capable of self-regulation, responsible leadership, and ethical behavior. In this context, emotional intelligence is an important integrative factor that combines the cognitive, emotional, and social aspects of the professional training of military personnel. The provisions of legislation in the field of national security and defense emphasize the need to develop the moral and psychological readiness of military personnel to perform their assigned tasks. This creates a regulatory basis for including the development of emotional intelligence in the content of educational programs at higher military educational institutions, the use of psychologically oriented teaching methods, training forms of work, and reflection practices. Thus, emotional intelligence can be seen as a structural component of modern military training, ensuring the integrity of their professional and personal development.

In summary, we note that the development of emotional intelligence in future officers is not only pedagogically expedient, but also an objective requirement of modern military activity and the regulatory and legal framework of military education.

Research materials and methods. The methodological basis of the study is a set of general scientific and special approaches, principles, and methods of cognition that ensure a comprehensive and systematic study of emotional intelligence as a structural component of modern military training. The study is based on a systematic approach, which made it possible to consider the training of military personnel as a complex, open, and dynamic system that functions in the context of normatively defined military activity and integrates professional, psychological, educational, and value components. The application of this approach made it possible to identify the relationships between the level of emotional intelligence development, the content of training, organizational conditions, and the requirements of military service. The personality-oriented approach ensured that the study focused on the development of the individual psychological characteristics of military personnel, in particular the ability to recognize and regulate their own emotional states, empathy, stress resistance, and effective interpersonal interaction in conditions of increased psycho-emotional stress. This approach made it possible to consider emotional intelligence not only as a professionally significant quality, but also as an important factor in the psychological readiness of military personnel to perform combat duties and make responsible decisions in complex and extreme situations.

Results and discussion. Current transformation processes in the field of national security, the emergence of new forms of hybrid threats from the aggressor state, as well as the growing intensity and unpredictability of hostilities, highlight the need to train military specialists capable of effective leadership in conditions of increased risk, stress, and uncertainty. In this context, the development of emotional intelligence as a structural component of modern military training is of particular importance. A modern officer must possess not only professional and managerial competencies, but also well-developed emotional, volitional, and socio-psychological qualities that ensure the ability to recognize and regulate one's own emotional states, effectively influence the motivation of subordinates, make operational and balanced management decisions, maintain the psychological stability of personnel, form cohesive team interaction, and act effectively in crisis and extreme situations (Allen, 2015). An analysis of current scientific research suggests that emotional intelligence in a military-professional context is considered one of the key psychological characteristics of an officer's personality, directly affecting the effectiveness of their service and combat activities. n scientific works, emotional intelligence is interpreted not only as the ability to recognize and understand one's own emotional states, but as a complex system of psychological skills that includes self-regulation, emotional stability, understanding other people's emotions, and the ability to constructively build

interpersonal relationships in conditions of heightened psychological and emotional stress. For the military environment, which is characterized by a high level of responsibility, risk, and uncertainty, these qualities are of particular importance.

In an officer's professional activities, emotional intelligence manifests itself in the ability to maintain self-control in crisis and extreme situations, respond appropriately to stressors, and make informed decisions in conditions of time and information constraints (Mowday, Porter, 2013). At the same time, an important component of emotional intelligence is the ability to recognize the emotional states of subordinates, predict their behavior, provide timely psychological support, and prevent the development of destructive emotional manifestations in the unit. It is thanks to this that an officer can maintain a stable moral and psychological climate, which is a necessary condition for preserving the combat readiness and cohesion of personnel.

A significant contribution to the scientific understanding of the phenomenon of emotional intelligence was made by D. Goleman (Goleman, 1995), who defines it as a set of interrelated skills of self-regulation, empathy, internal motivation, and social competence that ensure effective interaction of the individual with the social environment. According to the researcher, these components are important for leadership because they allow managers not only to achieve their goals, but also to inspire, support, and guide others. In a military context, D. Goleman's concept is particularly important, as an officer's leadership is based not only on formal authority, but also on the level of trust, authority, and emotional influence over subordinates. The emotional intelligence model developed by D. Goleman covers more than two dozen interrelated components — from basic emotional self-awareness to complex social skills, including teamwork, cooperation, service orientation, initiative, and achievement motivation. Summarizing these components, the researcher identifies five key components of emotional intelligence: self-awareness, self-regulation, motivation, social awareness, and relationship management. Self-awareness is seen as the ability of a person to recognize their own emotions, motives, and internal states, as well as to understand their impact on the behavior of others. It is associated with adequate self-esteem, self-confidence, and the ability to reflect. Self-regulation, in turn, means the ability to control emotional impulses, manage moods, and delay immediate gratification in order to achieve more meaningful and long-term goals. It is not just about restraining emotions, but about the ability to consciously control emotional reactions, logically analyze situations, and make informed decisions, even in states of high emotional stress. The third component of emotional intelligence is motivation, which in Goleman's concept is interpreted as an internal focus on achieving results, a desire for self-improvement, and a willingness to make efforts without constant external rewards. Motivated individuals are success-oriented, able to independently assess their own progress, and persistently move toward their goals. Social awareness includes, first and foremost, empathy—the ability to understand the emotions, needs, and experiences of others and respond appropriately to them. This component is a prerequisite for effective interpersonal interaction, especially in professional and managerial contexts. The final component is relationship management, which encompasses the skills of influencing, persuading, inspiring, and developing others, effective team leadership, negotiation, and constructive conflict resolution. Together, these components form a holistic view of emotional intelligence as a complex psychosocial resource that is important for successful performance in high-responsibility and social interaction environments.

Researchers Mayer and Salovey (Mayer, Salovey, 1990) proposed their own scientific approach to understanding the phenomenon of emotional intelligence, which differs significantly from Goleman's competency model. According to these researchers, emotional intelligence should be viewed primarily as a special type of cognitive ability related to the processing of emotional information. Within this approach, emotional intelligence is defined as the ability to accurately perceive, identify, evaluate, and adequately express both one's own emotions and those of others. In addition, Mayer and Salovey emphasize the ability of a person to use emotions or consciously evoke them in cases where they con-

tribute to the activation of thinking, decision-making, and solving complex tasks. An important component of emotional intelligence in this model is understanding emotions and emotional knowledge, which includes the ability to interpret the causes of emotional reactions, predict their development, and recognize the relationship between emotions and behavior. The final element is competence in regulating emotions, aimed at maintaining emotional balance, personal well-being, and promoting emotional and intellectual growth.

Israeli psychologist Reuven Bar-On is one of the first researchers to develop a comprehensive model of emotional and social intelligence, which has significantly expanded the scientific understanding of the psychological mechanisms of personal and professional development. His concept goes beyond the traditional interpretation of emotional intelligence as a set of individual skills and considers it as an integrative system of emotional and social abilities that ensure effective interaction between a person and their social environment. In a pedagogical context, this model opens up new perspectives for understanding professional activity, as it emphasizes the importance of emotional and social competence in the process of learning and education.

According to R. Bar-On (1997), the combination of emotional and social abilities creates additional opportunities for the harmonious social development of the individual. This manifests itself in the ability to recognize and understand one's own emotions and feelings, express them appropriately, understand the emotional states of others, and maintain constructive interpersonal relationships with them. An important component of this model is the ability to control one's emotional reactions, maintain inner balance, and act effectively in situations of emotional tension. In addition, Bar-On emphasizes the ability of an individual to be a "change manager," adapt to new conditions, solve personal and interpersonal problems, generate positive emotions, and maintain internal motivation, which is a necessary condition for successful professional and pedagogical activity.

The results of numerous empirical and theoretical studies convincingly demonstrate the existence of a pronounced positive correlation between the level of emotional intelligence and the quality of interpersonal relationships. In particular, it has been established that individuals with a high level of emotional intelligence demonstrate a greater ability to constructively resolve conflict situations, manage emotional tension more effectively, and achieve greater satisfaction with relationships within the team. Such characteristics are particularly important in a military environment, where interaction between commanders and subordinates is based on trust, cohesion, and mutual responsibility.

In the context of military leadership development, emotional intelligence is an important psychological resource that contributes to the formation of a shared vision of the unit's goals and strategy, the building of stable and productive interpersonal relationships, and the stimulation of effective joint activities. Officers with developed emotional intelligence are able to more accurately understand the emotional states of personnel, respond in a timely manner to manifestations of tension or maladjustment, and create a favorable moral and psychological climate, which directly affects the combat capability and effectiveness of the unit.

In this regard, researchers H. Bondarev, O. Dychko, and I. Krylenko present a number of arguments in favor of the feasibility of introducing concepts related to emotional intelligence into the system of military training and management (Bondarev, Dychko, Krylenko, 2021). They note that the development of emotional self-regulation, empathy, and social competence skills contributes to improving the quality of command, reducing the level of destructive conflicts, and strengthening the leadership authority of officers. Thus, emotional intelligence is considered one of the key factors for effective military leadership and the sustainable functioning of military teams in conditions of increased stress and uncertainty.

Emotional intelligence in an officer's activities performs an integrative function, combining cognitive, volitional, and socio-psychological aspects of professional training. It contributes to the formation of a responsible attitude towards management decisions, the development of effective communi-

cation skills, and the ability to reflect on one's own actions and experiences. In crisis situations, it is precisely developed emotional intelligence that allows an officer to maintain clarity of thought, avoid impulsive decisions, and ensure the smooth operation of the unit.

Thus, scientific research results convincingly demonstrate that emotional intelligence is an important psychological resource in military-professional activities, ensuring effective command, maintaining the moral and psychological stability of personnel, and ensuring the effectiveness of management decisions in complex and crisis situations. Its development should be considered a priority in the modern training of military personnel and future officers.

One of the key factors in the development of military leadership is, first and foremost, the high level of stress associated with professional activity, which is caused by the constant threat to life and health, the lack of time for decision-making, information uncertainty, and increased psycho-emotional tension. In such conditions, an officer-leader must possess the ability to self-regulate, be emotionally stable, and control his own reactions, since it is his psychological state that largely determines the overall moral and psychological climate in the unit.

An important factor in the development of military leadership is responsibility for subordinates and the results of combat operations. An officer bears personal responsibility not only for the performance of assigned tasks, but also for the safety, lives, and psychological well-being of personnel. This requires a high level of empathy, the ability to understand the needs and emotional states of subordinates, to provide timely support, and to make decisions that take the human factor into account.

Equally important is the need to make management decisions in situations of uncertainty and risk. In military activities, complete and reliable data is often lacking, forcing leaders to act in unpredictable conditions, quickly analyze the situation, predict possible consequences, and take responsibility for the chosen course of action. In such circumstances, developed critical thinking, inner confidence, and the ability to maintain psychological balance play a key role.

Teamwork, as the dominant form of organization, plays a special role in the development of military leadership. The effectiveness of task execution largely depends on the level of cohesion within the unit, the trust between the commander and subordinates, and the quality of communication. A military leader must be able to set common goals, coordinate the actions of team members, maintain mutual respect, and promote constructive interaction even in difficult and crisis situations. As noted by the authors of the study (Maksymenko, 2001; Khraban, 2022), in the context of military education, the formation and development of cadets' leadership competencies is ensured by the implementation of a number of targeted training areas, including:

– combining theoretical military-professional training with practical activities in various forms of training;
– using active educational technologies, in particular discussions, role-playing and business games, and analysis of situational cases;
– conducting comprehensive tactical exercises in an environment that is as close as possible to real combat conditions;
– involving cadets in command duties, in particular through the practice of junior commanders;
– participation in the activities of military scientific centers and research initiatives;
– introduction of mentoring and coaching support mechanisms from experienced officers;
– utilizing the professional experience of instructors who have participated in combat operations;
– completing internships in state border guard units to acquire practical unit management skills;
– developing leadership potential through participation in cadet self-government bodies;
– involving cadets in organizing and conducting self-development during independent preparation for training sessions;
– participating in international educational programs and training projects, including the relevance of studying a foreign language as an elective;

– including persons holding junior command positions in the advisory bodies of structural units in order to foster a sense of responsibility for their own unit, the opportunity to express their will on various issues and make personal decisions, the ecological impact on subordinates, and the distribution of situational tasks among subordinate personnel;

– integration of gender-sensitive approaches into the educational process as an element of shaping a modern style of military leadership;

– application of the principles of equality, tolerance, and accessibility in working with personnel.

An important aspect of emotional intelligence that receives considerable attention in the context of military service is organizational commitment, which is viewed as a psychological characteristic that reflects the degree to which a service member identifies with the values and goals of the organization. In the classical interpretation, organizational commitment is defined as a deep belief in organizational values, acceptance of the strategic and tactical goals of the institution, willingness to make additional efforts for its successful functioning, and a persistent desire to remain a member of the organization (Mowday, 2013). These characteristics are particularly important in the military environment, as service in the Armed Forces is associated with a high level of responsibility, risk, and the need for sustained psychological endurance. From the perspective of military management, organizational commitment can be seen as one of the key resources for effective personnel management and strategic development of human resources. A high level of organizational commitment contributes to increased motivation among military personnel, their readiness to perform complex combat tasks, adherence to discipline, and maintaining professional resilience under conditions of prolonged stress (Gade, 2003). In this context, emotional intelligence is an important psychological factor in the formation of organizational commitment, since it is the ability to recognize and regulate one's own emotions, understand the emotional states of others, and build constructive relationships that contributes to deeper identification. Scientific research indicates that military personnel with developed emotional intelligence demonstrate higher levels of job satisfaction, greater resistance to professional burnout, and a stronger sense of belonging to the military community. This, in turn, has a positive effect on personnel retention and reduces the likelihood of early contract termination and discharge from military service. In the context of modern security challenges, when the personnel stability of the Armed Forces is a strategically important factor, the development of emotional intelligence is of particular importance as a tool for maintaining organizational loyalty. Important findings in this area of research suggest that knowledge about the relationship between emotional intelligence and organizational commitment can form the basis for the development of effective military personnel policies. In particular, this refers to the introduction of psychologically oriented training and support programs for military personnel aimed at developing self-regulation, empathy, communication skills, and stress resistance. Such measures can not only increase the effectiveness of professional activities, but also create conditions for strengthening organizational loyalty, preserving, and fully realizing the personnel potential of the Armed Forces of Ukraine.

Conclusions. In this study, the authors analyze the peculiarities of emotional intelligence formation in the modern military training system. It has been established that emotional intelligence in the military sphere should be considered not as an auxiliary characteristic of personality, but as a structural component of professional training, which is organically combined with the cognitive, physical, and moral-volitional components of military activity. It has been proven that developed emotional intelligence ensures the ability of military personnel to understand and regulate their own emotional states, effectively manage their behavior in conditions of increased stress and uncertainty, and engage in constructive interpersonal interaction within the unit. These qualities are crucial for maintaining psychological stability, preserving combat readiness, and realizing the leadership potential of military personnel in the process of performing combat duties. The study found that emotional intelligence plays a system-forming role in the structure of modern military training, as it promotes the integration

of professional knowledge, management skills, and socio-psychological competencies. Its development has a positive impact on the level of organizational loyalty, motivation to serve, the ability to make responsible decisions, and the formation of effective teamwork. Summarizing the results of the analysis, it was concluded that the purposeful formation of emotional intelligence should be an integral part of educational training programs for military personnel.

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SCIENTIFIC AND TECHNOLOGICAL PROGRESS IN THE SERVICE OF PUBLIC ADMINISTRATION OF PUBLIC EDUCATION IN THE MODERN PERIOD OF HISTORY

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Abstract. This article is devoted to an interesting topic. By the current period of history, the consideration of various issues of the functioning of higher education not only from pedagogical positions, but above all from the side of government authorities looks very relevant. Thus, the idea of relying on the educational process as a whole on the achievements of high technologies turns out to be timely. This idea runs like a red line through all the work, in particular, additionally explaining the phenomenon of internationalization of public administration. It organically leads readers to think about the internationalization of public administration in the field of higher education, because the redistribution of roles between the four models/schemes of universities is considered on a global scale.

We also consider the merit of the author of the article to be an indispensable reference to the modern period of history. Moreover, the potential connection with public education in our republic is indicated locally, if necessary. And this, in our opinion, is by no means an artificial "adaptation" of the chosen topic to the realities of higher education in Azerbaijan. On the contrary, it is possible to draw a conclusion about the creative approach of the author. In general, it should be recognized that the presented work is written at the proper theoretical level, but at the same time it differs in both scientific and accessible language for the general reader.

Key words: public administration, higher education, scientific research, prototypes, design bureau

Introduction. The middle of the second decade of the 21st century makes significant adjustments to the system of public administration of public education. The role of the world's universities in the transfer of knowledge to the younger generation is especially increasing in connection with the era of globalization. This process has also affected public education in Azerbaijan, where scientific and technological progress, artificial intelligence and all their accompanying technologies urgently require the consolidation of joint efforts of specialists in various fields of public life. This applies entirely to the field of public education. For example, back at the turn of the 20th and 21st centuries, the main guideline was set for the development and improvement of academic activities, whereas in the current period of history, the state is mainly concerned about recruiting new personnel. We hasten to warn you right away: back in the days of the rule of the Soviet Empire, the slogan "Cadres decide everything" was proclaimed in Azerbaijan. It has maintained its power and effectiveness for many decades. However, the significant difference was that it was a personnel policy that was not based on high-tech achievements, which, on the contrary, has become a stable prerogative of modern times for public administration. Previously, technology for government managers was a goal in which the staff simply did not see themselves on the way to achieving it, but from now on the focus of the individual is focused on the process itself, personal professional growth, and not solely on its result. In other words, the state. A higher education manager exercises his powers and abilities in harmony with himself. This is worth a lot, as it gradually leads to a significant increase in human resources, as well as the requirements for it.

It is well known that the process in schools and universities under the auspices of the government has its own specific features. We are no longer talking about the division of functions by periods in schools (primary education and further by years). Therefore, all the attention in this article will be focused only on higher education. It is the task of our article to briefly show how it is managed by the state bodies of Azerbaijan.

First of all, we emphasize that the government is developing a general strategy for the scientific and technical development of higher education, mainly for the long term. The main goal of such a strategy is to achieve the competitiveness and independence of the state within the framework of statehood when creating and launching people with good knowledge of their business. So the effectiveness of this strategy primarily depends on the competent selection of high-class specialists. Following this path, the state basically reports on increasing the intellectual potential of its nation. Such a task is being set and solved on a global scale, but it is absolutely clear that it is being optimally implemented at the regional level. This means that it can and should be put on stream in Azerbaijan. Including in the field of higher education.

The purpose of this article is to analyze the current state of higher education governance in Azerbaijan, with a focus on developing a state strategy for the scientific and technological development of higher education. The article seeks to identify how the system of training specialists and developing personnel in higher education contributes to the country's competitiveness and independence, as well as how this contributes to strengthening the nation's intellectual potential.

The objectives of this article are:

1. To examine the impact of globalization on the higher education system, including management and training processes in Azerbaijan.
2. To analyze changes in the state personnel policy in higher education, taking into account scientific and technological progress and technology.
3. To evaluate current approaches to recruiting and training personnel in higher education and their compliance with the modern requirements of the global labor market.
4. To identify key features of the state strategy for scientific and technological development in the context of enhancing the country’s intellectual potential.

Discussion and results. In their study, the authors (Renze, Don 2020) emphasize that similar approaches to internationalization are leading to a gradual convergence of higher education systems, their practices, and governance mechanisms. They propose that the spread of internationalization in higher education and the associated convergence processes be considered a key research problem. This approach allows them to move beyond the description of individual national cases and focus on broader structural and institutional changes. The authors focus on questions aimed at a deeper understanding of internationalization and higher education governance: To what extent can the assumptions, values, and practices underlying the internationalization of higher education be understood from the perspective of a global community? And to what extent do these processes reflect the formation of common norms, standards, and governance models shared by different countries and regions?

School years are the first step in life, a springboard into the social environment. Higher education is a tool in the implementation of the main tasks of scientific and technical progress, and the state is a regulator of conditions for its development and improvement. But advanced political scientists, politicians and cultural scientists look at this problem more broadly: namely, government officials are seriously considering the issues of ensuring the availability of the latest technical means for the masses, their nation, while adapting to modern risks of STP.

In turn, the university is number 4.0. it is already designed for the highest level of technological progress, which modern society can achieve only in the distant future. In other words, getting higher education in the project. Ideally, it should correspond to the spirit and letter of the highest technical order. For managers, its implementation in the practice of state building is objectively a very distant prospect.

Research on the internationalization of higher education (IHE) has historically and continues to be dominated by scholars from Europe and North America. This is due to the European origins of the concept of internationalization and the leading role of the United States as the primary destination for international academic mobility in the 20th century. As a result, Western countries control the bulk of knowledge production in this field. Although some Asian regions (China, Hong Kong, and Japan) are gradually increasing their contribution to IHE research, their share remains limited, and Southeast Asian countries are even less represented. This underscores the need to analyze the current state of IHE research in Southeast Asian countries to identify underresearched topics and stimulate the region's scholarly contribution (Alex, 2021).

Bulut-Shanin et al. (Bulut-Shanin, 2022) consider international mobility of students and academic staff as one of the most significant and visible dimensions of the internationalization of higher education. They emphasize that mobility programs not only facilitate cross-border exchange of knowledge and academic experience but also contribute to the harmonization of educational standards and institutional practices. In this context, the Erasmus+ program, developed and implemented based on the extensive experience of the European Union, is highlighted as a particularly influential instrument. The authors note that Turkey is among the countries that have substantially benefited from participation in Erasmus+, as the program has provided Turkish universities with structured opportunities for international cooperation, curriculum development, and institutional capacity building. As a result, Erasmus+ has become a key driving force accelerating the internationalization processes within Turkish higher education, strengthening global engagement, and enhancing the international visibility and competitiveness of Turkish universities. Such an object is one of the operational ways of interaction and interdependence of different participants of innovations in the field of modern technologies, which are primarily aimed at obtaining a positive result from the commercialization of knowledge. Obviously, the task set in this way, in our opinion, should most of all concern not so much professional university teachers (school teachers, mentors, classroom teachers, etc.) as government managers, since the standardization of knowledge is based on economics. The levers of business and the mechanisms of new technological tools being introduced into this production should be actively involved here.

We can, at our discretion, assume that modern scientists of various specialties – politicians, political scientists, managers and cultural scientists - are concerned not only about the above-mentioned aspect, but also about a related one, that is, for example, modifications of structures in business with the idea of uniting state organizations, on the one hand, and their extensions on the other hand. It is not for nothing that the author of the outlined theoretical position pointed out that the commercialization of knowledge in the field of higher education should be closely linked to the educational and government line called “lifelong learning”, which means lifelong learning.

It is important to emphasize that there should be no unhealthy competition between the four university models. And this, of course, is already part of the functions of local government. We are referring to the fact that universities will compete for the right to be the first to transfer knowledge to students. Here is a specific example related to higher education in Azerbaijan. It is well known that the universities of the republic are clearly and traditionally divided into technical and humanitarian ones. Meanwhile, the division by profile also takes place within the university faculties themselves. For example, the curriculum of the Slavic University in Baku is almost identical to the course of the Faculty of Philology of the Republican State University. But in fact, the same situation persists in some metropolitan universities, where Azerbaijani students with an appropriate technical background receive education.

Now let us imagine the following situation: for example, the BSU in these core disciplines enters into an open confrontation with the BSU only on the grounds that the first university is a kind of “oasis of Slavic culture”. The same competition with a negative connotation may exist between uni-

versities with an inhumane profile for the right to use the latest technical achievements more or less in their work. In our opinion, the pursuit of such installations on the ground is a disastrous path. First of all, as we understand it, for the development of national science, growth and nurturing of highly qualified personnel in the future. If competition between universities is acceptable, it is only to the extent that it does not interfere with work.

To illustrate, let us take the activities of the republican media or social networks. To a certain extent, they are able to reproduce not only the realities of public life, but also create an illusory picture of the accessibility of success, in particular, in the field of higher education. There is an element of public administration in this process, when, through the manifestation of the cult of false achievements in specialists from different universities, but with a single profile, they arouse a desire to specifically match something, look up to the best, compare, compare facts. As a result, the personal initiative of the professionals in their field is lost, they are overshadowed by the psychological "theory of achievements".

According to a similar scheme, equalization between these four university models is unacceptable. The reverse process follows, when neither side achieves the desired success in education. In any case, there is activity with a minus sign. How can we avoid this negativity? The concepts from "1.0" to "4.0" should not be compared mechanically in an arithmetic sequence, but rather saturated with the latest technical means. In this case, the republican universities will openly resist the inert educational process, because it is the STP that will be at the service of public administration. And, of course, its employees have the responsible task of rationalizing the placement of technological accessories at universities.

First of all, the republic's higher education sector should be provided with all possible technological innovations by the state management apparatus. Moreover, in both humanitarian and technical universities in Azerbaijan, preference should be given to project work, laboratory and practical classes. In the current period of history, for example, organizations such as business clubs, incubators, and parks with technical equipment are actively contributing to this. Further, for example, in universities, conducting conversations between teachers and students is one of the most important methods. However, the hours allocated to this form of work may not always meet the needs of students in practice. Organizations or enterprises of public administration today have the opportunity to set up specialized platforms on the ground for conducting conversations and communication.

Those universities that, regardless of digital graduation, have more or less connection with business, various scientific and research units and centers, with proper government management, firstly, can benefit from the result of scientific research. Secondly, the status of universities will increase, which means the automatic transition of 1.0. to the next digital grade. Thirdly, the scientific knowledge transmitted by universities of all four ranks does not become the property of private individuals. With good public administration, universities of the above-mentioned models should not turn into a "private shop". On the contrary, they become public knowledge. Further, universities moving from one digital category to another are becoming competitive in the international market of services. When this process is regulated by government management bodies, it actually promotes the active growth of qualified personnel. This, of course, applies to both faculty and students. By the way, their IQ level is measured not only by current semester grades and exam scores, but also by presentations at conferences of various scales – from intra-university to international. They are usually organized not by the university authorities, but by government management bodies. In any case, it's clear that the second one overlaps the first one here. Their main functions include contractual principles, which are fixed in official documents and subsequently distributed to universities as orders or recommendations (Ahmadzadeh, 2000).

When government agencies, in turn, rely on the latest technological advances, the perspective of scientific and pedagogical research itself changes accordingly. Under the guidance of experienced

educators and government officials, they become interdisciplinary. The horizons of work are expanding. That is, equipped with the latest technology, universities (especially those designated with the letter 3.0 or 4.0.) most often turn out to be financially advantageous. Objectively speaking, the logic is elementary: the higher the status of the university and its technological equipment, the easier it is for the state to find alternative financial sources for the successful continuation of scientific research by both established teachers and capable students. Indeed, the stands guard over public administration in this case, because it allows professionally competent regulation of the process of research activities combined with the outflow of personnel. The fact that they are moving from university to university due to increased rates is out of the question. This phenomenon, popularly referred to as staff turnover, is observed throughout the civilized world, including higher education in Azerbaijan. But government authorities in the modern period are certainly concerned about these negative phenomena and, ideally, ways to put a firm barrier to it (Sursock, Smidt, 2010).

Now let's think about it: these scientists write about higher education in relation to the Russian Federation. And they don't hide it, because the present provision is the purpose of their article. However, it is quite obvious to us that this situation is all the more applicable to higher education in our republic, as it fully meets both the realities of the day and multiculturalism as the most important strategy of the Government of Azerbaijan. It is no secret to anyone these days that, unlike other republics of the Transcaucasia and even many Western European countries, multiculturalism has become the norm of behavior in society and a way of life indicative of other countries of the world since the reign of the national leader of the Azerbaijani people, Heydar Aliyev.

This state of affairs could not but have a positive impact on higher education. Even the domestic sector of a number of universities in the republic is distinguished by its multinational student body. From here, a chain reaction makes itself felt: the selection of qualified teaching staff - multinational membership in student groups – the performance of independent work by the latter – management control. And such a chain, supported by the technical rise of recent years, allows us to recognize that all of the above in its links are indisputable components of success in scientific research at Azerbaijani universities. We are also convinced that the above-mentioned role of scientific research in the field is, of course, enhanced by the attention of government.

First of all, we state that the forms and methods of mutual action in the field of national higher education are interconnected with the strategy of the state. It, in turn, is successfully implemented thanks to scientific discoveries, on the one hand, and the technical support of universities of all models, on the other. It is clear that without additional cash injections, organizational procedures will be suspended. And already, of course, not only within our republic, but also on the scale of the entire modern civilized world. The essence of the matter lies in various ways of state support for universities through the transfer of necessary funds for scientific research. Moreover, it should be assumed that financial assistance should be classified according to a specific institution, since technical equipment is still unevenly distributed in educational institutions of our republic (De Wit, 2020).

We are referring to the fact that republican universities are funded in such a popular and effective form as grants. Government officials claim that grants have both individual and package forms. The first ones are intended for sole use (in some cases, the performer is a small group of researchers). The latter are used for large teams, more often units of a scientific, theoretical or practical nature. The support of national higher education through grants allows universities to increase their scientific and practical potential in the near future (On reforms carried out in the field of higher education within the framework of the Bologna process).

Conclusions. Another and no less useful form of active support of technical potential for universities nowadays is the organization of partnership by the state. By analogy with the receipt and distribution of grants, this form is also divided into private and public sectors. But in any case, this is a partnership mechanism in which three structures cooperate: the government, the business plan

and educational institutions. If technological innovations are put at the center here, then all the more so with the help of a skillful state. The factor of commercialization of higher education is increasing. We have already had the opportunity to talk about how important and essential this is in this article.

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ETHICAL FOUNDATIONS OF FORMING A LIFE SAFETY CULTURE IN EDUCATIONAL ENVIRONMENTS UNDER CONDITIONS OF SOCIAL RISK

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Abstract. The article examines the ethical foundations of forming a life safety culture in the educational environment as a key condition for sustainable human development under conditions of social instability, technological risks, and wartime challenges. The relevance of the study is determined by the growing vulnerability of educational participants and the increasing complexity of ethical dilemmas related to safety, responsibility, and human dignity. The research is based on an interdisciplinary theoretical analysis combining pedagogy, ethics, philosophy of education, and life safety studies. Methods of analysis, synthesis, generalization, and conceptual modeling were applied. The results demonstrate that ethical values act as an internal regulator of safe behavior, transforming external safety requirements into personally meaningful norms. The article substantiates pedagogical conditions for integrating ethical principles into life safety education and outlines prospects for developing value-oriented educational models aimed at strengthening individual and collective safety.

Key words: moral responsibility, educational ethics, safety culture, human dignity, risk awareness, wartime education, social responsibility.

Introduction. The contemporary educational landscape is characterized by a heightened awareness of risks, uncertainties, and social disruptions, which necessitate a reevaluation of traditional approaches to safety education. In recent decades, globalization, technological advances, climate change, and social conflicts have amplified the complexity of the environments in which learners and educators operate. This reality has led scholars to recognize that ensuring life safety in educational settings cannot rely solely on regulatory frameworks, technical instructions, or emergency protocols. Instead, there is a growing need for integrating ethical and value-based approaches that foster internalized, sustainable safety behavior.

Life safety culture, in this context, is understood not merely as the mastery of practical safety skills or compliance with formal rules but as a holistic system encompassing knowledge, moral responsibility, emotional attitudes, and behavioral strategies. The concept of ethical life safety culture highlights that the formation of safety-oriented behavior is inseparable from the broader moral and pedagogical dimensions of education. As Beck (1992) emphasizes in his analysis of risk society, modern threats are not always predictable and require reflexive, value-driven responses rather than purely technical solutions. Similarly, Giddens (1999) underscores that late modernity calls for ethical responsibility as a guiding principle in navigating social complexity.

The global and regional challenges of the twenty-first century, including armed conflicts, emergencies, and environmental crises, have further intensified the relevance of ethical life safety education. UNESCO (2020) and OECD (2018) stress the importance of education in emergencies and risk-laden contexts, emphasizing that education should preserve human dignity, social cohesion, and psychological resilience. In this regard, educational institutions are not merely venues for knowledge transmission; they become critical spaces for moral and ethical orientation, socialization, and the cultivation of responsible agency.

Ethical considerations are central to understanding how learners internalize safety behaviors. Without a moral foundation, safety measures may be perceived as external impositions, leading to superficial compliance or even resistance. Conversely, when safety norms are grounded in ethical principles such as respect for human dignity, responsibility, solidarity, and justice, learners are more likely to adopt them meaningfully and sustainably. The work of Nussbaum (2011) and Sen (2009) provides a theoretical basis for interpreting life safety as a capability—an ethically mediated competence that enables individuals to act responsibly and preserve their well-being and that of others in complex environments.

Furthermore, the role of the teacher as a moral agent is highlighted in pedagogical theory as essential for the ethical formation of safety culture. Teachers serve as models of ethical behavior, decision-making, and risk assessment, influencing how learners perceive and internalize safety-related values. Zembylas (2017) notes that the emotional and ethical dimensions of teaching significantly affect students' moral dispositions and social sensitivity. Consequently, teacher training programs must integrate ethical components related to life safety, crisis response, and moral judgment, ensuring that educators are prepared to navigate both predictable and unforeseen hazards.

Recent research demonstrates that the integration of ethics into life safety education contributes not only to the cognitive understanding of risks but also to the development of emotional resilience, social responsibility, and adaptive behavior. In contexts such as wartime education, where learners and teachers face both physical threats and moral dilemmas, ethical education becomes indispensable. It provides a framework for navigating moral ambiguity, maintaining agency, and fostering collective solidarity. Education, therefore, assumes a dual function: safeguarding lives while reinforcing humanistic values and ethical social norms.

This article seeks to address the complex intersection of education, ethics, and life safety by examining the theoretical foundations, practical implications, and pedagogical strategies necessary for forming a robust culture of safety in educational environments. The research aims to explore how ethical principles can be systematically integrated into safety education, how teachers can act as moral agents, and how such approaches can enhance resilience, social cohesion, and human development in contexts of social risk and crisis. By analyzing these dimensions, the study contributes to both theoretical advancement and practical guidance for educators, policymakers, and institutions aiming to develop sustainable, ethically grounded life safety cultures.

Research Objectives. The objectives of the study are: to analyze the conceptual relationship between ethics and life safety culture; to clarify the role of ethical values in shaping safe behavior in educational environments; to identify pedagogical mechanisms for integrating ethical principles into life safety education; to consider the specificity of ethical life safety formation under wartime conditions; and to outline prospects for further research in this field.

Materials and Methods. The research is theoretical and interdisciplinary in nature. The methodological basis of the study includes the axiological approach, which considers values as the core of educational processes; the human-centered approach, emphasizing the intrinsic worth of human life and dignity; and the systems approach, which allows life safety culture to be analyzed as an integral phenomenon.

The following methods were used: theoretical analysis of philosophical, ethical, and pedagogical literature; synthesis and generalization to identify key conceptual positions; comparative analysis to examine different models of safety culture formation; and conceptual modeling to construct an integrative framework for ethical life safety education. Well-established ethical theories and pedagogical concepts were used with appropriate references, allowing the research to be theoretically reproducible.

Conceptualizing Life Safety Culture in Education Life safety culture in the educational environment can be defined as a stable system of values, norms, knowledge, skills, and behavioral strategies

aimed at preserving life, health, and psychological well-being. Unlike formal safety training, which focuses on compliance with instructions, life safety culture emphasizes conscious, responsible, and proactive behavior in situations of risk.

From a pedagogical perspective, life safety culture includes cognitive, emotional-value, and behavioral components. The cognitive component encompasses knowledge about potential risks and ways of minimizing them. The behavioral component involves practical skills and habits related to safe conduct. However, it is the emotional-value component that ensures the integrity of the system by providing ethical motivation for safe behavior.

Ethics functions as the internal core of life safety culture. Ethical values such as responsibility, respect for human dignity, solidarity, justice, and care transform safety norms into moral imperatives. Without this ethical dimension, safety rules remain external and situational, easily ignored in conditions of stress or uncertainty.

Ethical Foundations of Life Safety Culture The ethical foundations of life safety culture are rooted in fundamental moral principles recognized across cultures. First and foremost is the principle of respect for human life as the highest value. In educational environments, this principle manifests in the recognition of each participant's right to safety, dignity, and protection from harm.

Responsibility represents another key ethical foundation. It involves not only personal responsibility for one's own actions but also responsibility for the safety of others. In educational settings, responsibility acquires a collective dimension, as the actions of one individual may directly affect the well-being of many.

Solidarity and care are particularly important in contexts characterized by heightened vulnerability, such as inclusive education or wartime conditions. These values foster mutual support and empathy, encouraging individuals to prioritize collective safety over individual convenience. Ethical education thus becomes a mechanism for strengthening social bonds and resilience.

Pedagogical Mechanisms for Integrating Ethics and Life Safety The integration of ethical principles into life safety education requires purposeful pedagogical strategies. One effective mechanism is the inclusion of ethical dilemmas related to safety in educational content. Such dilemmas stimulate moral reflection and help learners develop the ability to make responsible decisions in complex situations.

Another important mechanism is the modeling of ethical behavior by educators. Teachers act as moral agents whose attitudes toward safety, risk, and responsibility significantly influence learners. Institutional policies and practices also play a crucial role by establishing ethical standards that regulate behavior within the educational environment.

Participatory teaching methods, such as discussions, case studies, and project-based learning, enhance the internalization of ethical values. These methods encourage learners to actively engage with safety-related issues and to perceive them as personally meaningful rather than abstract requirements.

Life Safety Culture in Wartime Educational Contexts Wartime conditions impose specific challenges on educational systems. The constant presence of physical danger, psychological stress, and uncertainty undermines traditional safety frameworks. In such contexts, ethical foundations become a stabilizing factor that supports resilience and adaptive behavior.

Education during wartime must address not only practical safety measures but also moral questions related to fear, responsibility, and solidarity. Ethical life safety education helps learners cope with trauma, maintain a sense of agency, and preserve humanistic values under extreme conditions.

The integration of ethical principles into wartime education contributes to the formation of a culture of non-indifference, where safety is perceived as a shared moral responsibility. This approach strengthens trust within educational communities and enhances their capacity to respond to crises.

Results The theoretical analysis demonstrates that the formation of a life safety culture is most effective when ethical values are systematically integrated into educational processes. Ethics func-

tions as an internal regulator that transforms external safety norms into stable behavioral patterns. Educational environments that emphasize ethical reflection show higher levels of risk awareness, responsibility, and mutual support.

The study reveals that ethical-oriented life safety education promotes holistic development by combining cognitive understanding with moral motivation. This integration is particularly significant in conditions of social instability, where formal regulations alone are insufficient to ensure safety.

Discussion. The results obtained in this study correspond with and extend a number of influential theoretical positions in contemporary educational and ethical research. Comparative analysis shows that the ethical interpretation of life safety culture proposed in this article goes beyond instrumental and regulatory models dominant in traditional safety education. For example, Beck's concept of the risk society emphasizes the structural nature of modern risks and the insufficiency of technical control mechanisms (Beck, 1992: 87). In contrast, the present study demonstrates that ethical internalization at the individual and institutional levels functions as a compensatory mechanism capable of addressing risks that are unpredictable and morally ambiguous. This study further illustrates that in environments where rules and regulations alone cannot anticipate or mitigate all hazards, ethical reasoning and moral reflection provide a flexible and adaptable framework for decision-making. Such a framework allows both learners and educators to navigate complex scenarios that combine physical danger with moral uncertainty, highlighting the significance of cultivating an ethical consciousness as an integral part of the safety culture. Furthermore, the incorporation of ethical principles into everyday practice strengthens institutional resilience, because organizations that actively engage in ethical reflection are better positioned to anticipate, evaluate, and respond to emerging risks.

Similar conclusions are drawn in the works of Giddens, who argues that late modernity requires reflexive forms of responsibility rooted in moral judgment rather than rigid norms (Giddens, 1999: 102). The findings of this article align with this position by showing that ethical reflection enables learners and educators to adapt safety-oriented behavior to changing contexts, including digital and wartime environments. At the same time, the study expands Giddens' framework by situating ethical responsibility explicitly within pedagogical practice. This integration of ethical reflection allows learners to critically evaluate potential threats, make informed decisions, and act responsibly even in complex, high-risk situations. By embedding these reflective practices into curricula, educators create opportunities for students to engage with ethical dilemmas through simulation, scenario analysis, and collaborative discussion. This experiential learning process not only reinforces moral judgment but also strengthens problem-solving skills, situational awareness, and the capacity for cooperative action in groups, which are essential competencies for functioning effectively in risk-laden environments. Moreover, ethical reflection nurtures a culture of continuous learning and adaptation, as both students and teachers regularly revisit and reassess their approaches to safety in light of new experiences, emerging technologies, and evolving social conditions.

The capability approach developed by Nussbaum and Sen provides an additional comparative perspective. According to this approach, education should enhance individuals' capabilities to live a dignified and safe life (Nussbaum, 2011: 69; Sen, 2009: 254). The present research supports this idea by conceptualizing life safety culture as an ethical capability that integrates knowledge, moral motivation, and social responsibility. Unlike purely cognitive interpretations, this approach emphasizes the formative role of values in shaping sustainable safety behavior. The findings indicate that fostering these ethical capabilities requires targeted pedagogical interventions that integrate moral reasoning, scenario analysis, and reflective practice into standard curricula. Ethical capability development goes beyond the mere acquisition of information about hazards and safety protocols; it encompasses the cultivation of judgment, foresight, empathy, and the internalization of social responsibility. In practice, this could involve structured discussions on historical case studies of crises, role-playing exercises that simulate emergencies, and critical reflection on ethical decision-making processes. The incorpo-

ration of such activities creates a dynamic learning environment in which ethical principles are lived, experienced, and repeatedly reinforced, contributing to the gradual and sustained internalization of life safety culture as an essential component of personal and collective conduct.

In contrast to models focused primarily on compliance and risk avoidance, ethical life safety education fosters moral agency and resilience. This distinction becomes especially visible in crisis situations, where formal rules may be absent, contradictory, or impossible to follow. For instance, in situations of sudden natural disasters or wartime emergencies, learners equipped with ethical reflection skills demonstrate higher adaptability and the ability to protect themselves and others. By embedding ethical principles into daily educational practice, students internalize a value-based framework for risk assessment and responsible decision-making. In addition, resilience developed through ethical education manifests not only as individual adaptive capacity but also as enhanced community cohesion, collective problem-solving, and the capacity to manage complex social interactions during emergencies. The promotion of moral agency allows students to move beyond passive compliance and develop the confidence to take initiative, make difficult ethical choices, and assume responsibility for the safety and well-being of peers and community members, thereby reinforcing both personal and systemic resilience.

The discussion of ethical life safety also intersects with psychological and social dimensions. Research has shown that emotional intelligence and empathy play a critical role in ethical behavior and decision-making under risk (Zembylas, 2017: 5). Ethical life safety education that incorporates these dimensions can enhance social cohesion, improve peer support systems, and promote a shared sense of responsibility within educational communities. Furthermore, reflective discussions about ethical dilemmas in classroom and simulated scenarios encourage critical thinking and the development of moral reasoning skills, which contribute to long-term resilience. By integrating these psychological aspects into educational strategies, institutions can create supportive learning environments that not only teach technical safety procedures but also address the emotional and social competencies necessary for effective risk management. Students learn to recognize and respond to stress, anxiety, and fear in themselves and others, developing empathy and cooperative skills essential for functioning in high-pressure situations.

Comparative studies reveal that different cultural and institutional contexts shape the implementation and outcomes of life safety education. In countries with well-established safety protocols, ethical education complements technical measures by reinforcing personal responsibility and community engagement. In contrast, in regions experiencing social instability or armed conflict, ethical instruction becomes a central pillar for sustaining safe behavior and psychosocial well-being. These insights highlight the need for context-sensitive approaches that consider social, cultural, and environmental variables in curriculum design. Additionally, the comparative perspective illustrates how systemic factors, such as policy frameworks, community norms, and resource availability, interact with ethical education to influence the effectiveness and sustainability of life safety culture. Such understanding is crucial for the adaptation and scaling of ethical life safety programs across diverse educational settings and socio-political contexts.

The analysis also indicates that ethical life safety education promotes preventive behavior and long-term risk mitigation. Students trained in ethical reflection are better equipped to anticipate potential hazards, communicate effectively during crises, and make morally responsible choices even under pressure. This outcome underscores the critical role of integrating ethical reasoning with practical safety training to develop a holistic life safety culture. Furthermore, preventive behavior cultivated through ethical education contributes to broader societal benefits, including reduced incidence of accidents, improved community preparedness, and the development of ethically aware citizens capable of contributing to public safety. The pedagogical strategies emphasized in this study highlight the interdependence between moral education, social responsibility, and proactive risk management, demonstrating the far-reaching impact of ethical life safety culture beyond the classroom.

Finally, the study highlights the interaction between ethical education and institutional policies. Schools and universities that prioritize ethical life safety principles create a culture in which students and staff collectively maintain high standards of behavior, anticipate risks, and support each other in times of crisis. The systemic integration of ethical education into institutional frameworks ensures sustainability and scalability of life safety culture, creating resilient educational communities prepared for both everyday challenges and extraordinary emergencies. Ethical education embedded within institutional policies also reinforces accountability mechanisms, establishes shared norms, and fosters a sense of collective identity centered on responsibility and safety. This systemic approach ensures that ethical life safety is not merely a theoretical construct but a lived, organizational practice that permeates institutional culture, shapes everyday decision-making, and cultivates long-term resilience across educational communities.

Conclusion. The conducted theoretical research allows for a comprehensive generalization of the problem of forming a life safety culture in educational environments under conditions of social risk and wartime instability. The analysis confirms that life safety culture cannot be reduced to a set of technical instructions, formal rules, or isolated educational activities. Instead, it should be understood as a complex ethical and pedagogical phenomenon grounded in values, moral responsibility, and conscious choice. In this sense, ethics performs a system-forming function, integrating cognitive, behavioral, emotional, and axiological components of safety-oriented behavior into a coherent and sustainable structure.

The study demonstrates that ethical foundations transform safety from an external regulatory requirement into an internalized moral imperative. When safety norms are supported by ethical values such as respect for human dignity, responsibility, solidarity, justice, and care, they acquire personal meaning for participants in the educational process. This internalization ensures the stability of safe behavior even in situations characterized by uncertainty, stress, and the absence of clear normative guidance. Such conditions are especially typical of wartime education, where formal rules may be insufficient or impossible to apply consistently.

A significant conclusion of the research is that education serves as a key social mechanism for the ethical formation of life safety culture. Educational environments shape not only knowledge and skills but also moral attitudes toward risk, vulnerability, and responsibility for others. The integration of ethical reflection into life safety education fosters learners' ability to assess risks holistically, taking into account not only personal interests but also social consequences. This contributes to the development of socially responsible behavior and strengthens collective resilience.

The article substantiates that the role of the teacher as a moral agent is central to the effective formation of life safety culture. Teachers embody ethical norms through their professional conduct, decision-making, and communication practices. By modeling responsible and caring behavior, educators create a moral climate that encourages learners to adopt safety-oriented values voluntarily. Therefore, the ethical dimension of teacher training should be recognized as a strategic priority in educational policy, particularly in contexts of social crisis and armed conflict.

The wartime context analyzed in the study highlights the heightened importance of ethical life safety education. Under conditions of physical danger, psychological trauma, and social fragmentation, ethical principles become a source of stability and moral orientation. Education in such circumstances fulfills a dual function: ensuring physical and psychological safety while preserving humanistic values and social cohesion. Ethical life safety culture supports learners' capacity to cope with moral ambiguity, fear, and loss, enabling them to maintain agency and dignity in extreme situations.

From a theoretical perspective, the research contributes to pedagogical science by conceptualizing life safety culture as an ethical category rather than a purely technical or administrative one. This approach expands existing models of safety education and aligns them with contemporary philosophical and educational theories that emphasize value-based learning, moral agency, and human-cen-

tered development. The comparative analysis with established theories of risk society, responsibility ethics, and capability-based education confirms the scientific novelty and relevance of the proposed framework.

In practical terms, the findings of the study may be used to improve educational curricula, teacher training programs, and institutional policies aimed at strengthening life safety culture. The ethical integration of safety education offers a flexible and adaptive model capable of responding to emerging risks that are not yet regulated by formal norms. This is particularly important in rapidly changing social environments where new threats continuously arise.

The study also outlines prospects for further research, which include empirical validation of ethical life safety models, comparative studies across different educational levels and cultural contexts, and the development of assessment tools for measuring ethical dimensions of safety culture. Further research may also explore the long-term impact of ethical life safety education on individual behavior and social resilience.

In conclusion, the formation of a life safety culture in educational environments under conditions of social risk requires a paradigmatic shift from rule-based instruction to value-oriented education. Ethics provides the conceptual and practical foundation for this shift, ensuring that safety becomes an integral part of personal identity and social responsibility. The ethical foundations substantiated in this article create a theoretical basis for the development of sustainable, humane, and resilient educational systems capable of responding to the challenges of the contemporary world.

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ENHANCING STUDENTS' FOREIGN-LANGUAGE WRITING SKILLS THROUGH DIGITAL DIDACTIC TOOLS

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Abstract. This study investigates the development of foreign language writing competence in German as a second foreign language among Ukrainian university students through electronic didactic tools. A four-stage methodology was developed and implemented over ten months, integrating classroom and distance learning formats. The methodology incorporated Internet services (email, search engines), Internet resources (video lessons, interactive exercises), graphic files, and multimedia presentations. The four stages included organizational-preparatory, training with model support, productive-creative, and reflective-evaluative phases.

Assessment criteria measured five competence components: linguistic, discursive, pragmatic, strategic, and sociocultural. Results demonstrated significant improvement in the experimental group, while the control group showed minimal change. Statistical analysis using chi-square tests confirmed significant differences between groups.

The findings validate that systematic use of electronic didactic tools within a structured integrative approach significantly enhances foreign language writing competence, addressing all competence components while promoting learner autonomy and motivation.

Key words: foreign language writing competence, electronic didactic tools, German as a second foreign language, integrative approach, distance learning, digital literacy.

Introduction. The socio-political, economic, and social changes that have taken place in Ukraine over recent decades have led to significant transformations in the educational sphere as well. According to contemporary requirements, students must possess the necessary competencies to carry out various types of activities, as well as critical thinking skills and experience in creative activity. They must be able to use new information and communication technologies not only for personal purposes but also for professional ones.

The process of informatization in education has influenced the expansion of the arsenal of teaching technologies and electronic didactic tools, the use of which facilitates students' transition to a higher level of foreign language communicative competence formation. A number of works by Ukrainian pedagogy methodologists (O. Bihych, N. Borysko, N. Maiier, S. Nikolaieva, V. Chernysh), as well as foreign researchers (D. Nunan, M. Byram, B. Handwerker, U. Steinmüller), examine the educational potential of Internet services and resources for foreign language teaching and the development of foreign language communicative competence.

An analysis of scientific literature from recent decades shows that a number of important aspects of teaching foreign language writing have been developed and comprehensively analyzed to date, namely:

– *the content of teaching foreign language writing* in non-language higher education institutions (N. Maiier, V. Chernysh, O. Kozlova), and in language higher education institutions (N. Borysko, S. Nikolaieva, A. Hirvela, D. Hyland);

– *the formation and development of foreign language writing skills* (J. Harmer, S. Kiyko, A. Raimes);

– *the use of information and communication technologies in education* (V. Bykov, M. Bates, T. Anderson);

– *practical methodologies for teaching foreign languages using information and communication technologies in higher education institutions* based on web-quests and project-based technologies (N. Morze, T. March), electronic learning environments and learning management systems (V. Kukharenko, D. Jonassen), corpus technologies and digital resources (S. Gries, U. Stefanowitsch); in general secondary education institutions – based on podcasts and multimedia programs (G. Stanley, R. Godwin-Jones);

– *ways and methods of teaching foreign language writing using information and communication technologies in higher education* institutions based on blog technologies and Wiki environments (M. Warschauer, T. Kessler), digital platforms and social networks (R. Blattner, M. Fiori), as well as Internet resources as a means of developing academic writing.

An analysis of the aforementioned works indicates that issues concerning the formation of students' foreign language writing competence in German as a second foreign language through electronic didactic tools have remained outside the scope of attention. The essence and structural components of students' foreign language writing competence are insufficiently described, the complex of electronic didactic tools for forming foreign language writing competence has not been determined, the approaches, principles, and organizational-pedagogical conditions for teaching foreign language writing through electronic didactic tools have not been established, and the criteria and levels of students' foreign language writing competence formation have not been defined. Diagnostic instruments for identifying the level of students' foreign language writing competence formation require in-depth attention. It is also necessary to develop practical recommendations for teachers on using electronic didactic tools in forming students' foreign language writing competence. All of the above determines the relevance of our research.

The *object of the research* is the process of forming foreign language writing competence among junior-year students studying German as a second foreign language. The *subject of the research* is the development of a methodology for forming students' foreign language writing competence through electronic didactic tools. *The aim of the research* involves the development, substantiation, and verification of a methodology for forming students' foreign language writing competence through electronic didactic tools.

The study proposes a hypothesis according to which the formation of students' foreign language writing competence will be effective if:

(1) this process is organized on the basis of a methodology for the gradual formation of students' foreign language writing competence through a complex of electronic didactic tools, including Internet services, Internet resources, graphic files, and multimedia presentations;

(2) the proposed methodology is based on an integrative approach using electronic didactic tools according to the principle of integrating classroom and distance learning formats;

(3) the formation of students' foreign language writing competence through electronic didactic tools is implemented with adherence to the following conditions:

a) organization of electronic foreign language correspondence between the instructor and students and provision of pedagogical support to students from the instructor;

b) organization of foreign language interpersonal communication among students based on correspondence materials;

c) independent writing by students of personal electronic letters or business letters based on a model sent by the instructor;

d) establishment of levels of formation of students' foreign language writing competence based on a set of criteria (mastery of methods for constructing foreign language written utterances in accordance with the communication situation; formation of sociocultural and sociolinguistic competences; formation of linguistic competence; high learning motivation).

Main part. Analysis of scientific and pedagogical literature from recent decades indicates that in connection with the transition to a new paradigm of education and upbringing, the competency-based approach has gained significant prevalence. For a long time, it was considered primarily in the context of professional education (O. Savchenko, I. Zyazyun, V. Baidenko, S. Kiyko, J. Raven, F. Weinert). However, following the publication of the Presidential Decree "On the National Strategy for the Development of Education in Ukraine for the period up to 2021" (https://zakon4.rada.gov.ua/laws/show/344/2013) and the ordinance of February 23, 2022 No. 286-r "On approval of the Strategy for the Development of Higher Education in Ukraine for 2022-2032" (https://mon.gov.ua/osvita-2/vishcha-osvita-ta-osvita-doroslikh/strategiya-rozvitku-vishchoi-osviti-v-ukraini-na-2022-2032-roki), there has been a reorientation in evaluating educational outcomes from the concepts of "preparedness," "educatedness," "general culture," and "upbringing" to the concept of "competence." Accordingly, a competency-based approach in education is being established, which involves a significant strengthening of the practical orientation of education and is aimed at developing students' personal qualities.

Foreign language speech competence is the ability to successfully communicate in the target language, combining knowledge of rules (grammar, vocabulary) with the ability to apply them in practice in real situations, taking into account linguistic and extra-linguistic means (gestures, intonation) and cultural context, in order to effectively convey and understand messages. It is a dynamic combination of knowledge, skills, ways of thinking, and value qualities for successful communication.

Authors who study the problem of forming foreign language written speech competence in students of language higher education institutions identify five of its components: linguistic, discursive, pragmatic, strategic, and sociocultural competences (Canale, Swain, 1980; Council of Europe, 2001; Kiyko, 2017; Nikolaieva, 2010). Let us explain the components of foreign language written speech competence as understood by these authors.

Linguistic competence manifests itself in the correct use of foreign language forms. It presupposes knowledge of language rules (phonological, morphological, syntactic, lexical) and the ability to operate with them in the process of formulating one's own thoughts and understanding the thoughts of a communication partner. In the sphere of written speech, linguistic competence ensures the ability to freely use linguistic and speech material for constructing written texts as means of interpersonal and professional communication (Canale, Swain, 1980; Bachman, 1990; Council of Europe, 2001).

Discursive competence manifests itself in mastering various types of discourse. This aspect of foreign language written speech competence presupposes the ability to connect one utterance with another, as well as the ability to logically present thoughts in written communication situations. Some researchers understand discursive competence as knowledge of how to combine grammatical forms and semantic content to create coherent oral or written texts of various genres in different communication situations (Canale, Swain, 1980). Other authors see in discursive competence verbal, non-verbal, and paralinguistic knowledge that determines the ability to properly organize the semantic content of oral and written texts (Scarcella, 1990: 159-161). H. Brown defines discursive competence as the ability to connect sentences into discourse fragments and structure a meaningful whole from a series of utterances (Brown, 1987). In this work, we understand discursive competence as the ability to connect individual sentences into microtext (paragraph) using grammatical, logical, lexical, and figurative means and to construct a written text that functions as a means of written communication.

Pragmatic competence consists in the ability to achieve a set goal in oral and written communication

through various techniques of obtaining and transmitting information. Authors define pragmatic competence as a way of optimal use of linguistic means for the purpose of solving a communicative task (Norris 1991).

Strategic competence consists in the ability to compensate for the lack of linguistic means in the course of written speech. It is a set of skills and communicative abilities that allow for selecting and, if necessary, adjusting a particular intercultural communication situation or a foreign language model of written text/discourse in accordance with the author's communicative intentions (Scarcella, 1990: 160). We believe that self-control skills occupy an important place in the content of strategic competence. When creating a written text, the author must monitor orthographic correctness, structural-semantic and compositional formatting of their work.

Sociocultural competence presupposes possession of background, country-specific, and general cultural knowledge formed within a particular linguistic and cultural community and reflecting its culture, way of life, and traditions. It encompasses knowledge of the ethno-sociocultural background of specific foreign language written communication situations, value orientations of communication participants, norms of communicative-speech etiquette of the written form of communication, as well as linguistic and cultural features of the logical-compositional organization of foreign language written texts (Council of Europe, 2001).

Thus, by foreign language written speech competence we understand students' ability to perform foreign language written speech activity in the form of a combination of linguistic knowledge and speech skills for the purpose of creating a written foreign language text in accordance with the communication situation. The expansion and strengthening of international relations, the development of information and communication technologies, and the use of the Internet in the educational process require changing the status of written speech and its place in the paradigm of modern education.

The process of teaching foreign language writing in universities is carried out with gradual complication of subject content, volume and nature of texts, and increasing complexity and diversity of linguistic means used. Students' independence in this type of activity depends largely on the level of formation of general educational and compensatory (adaptive) skills. General educational skills include, in particular, working with reference sources and educational literature, using dictionaries; conveying the main content and main idea of a read or heard text; description (brief and detailed), comparison and juxtaposition of facts; argumentation and proof; generalization, combination and systematization of information; characterization, expressing evaluation and one's own attitude to the presented information, abstracting and commenting (O'Malley, Chamot, 1990). Compensatory skills encompass the ability to paraphrase utterances, express complex thoughts using simpler linguistic means, as well as the ability to rely on text for the purpose of searching and selecting necessary information (Canale, Swain, 1980; Bachman, 1990; Council of Europe, 2001). When teaching this type of speech activity, students need to master language rules, learn to use them for the purpose of expressing their own and others' thoughts by means of a foreign language, as well as master the ability to use various supports when independently composing one or another written utterance. The teacher's task is to create favorable conditions for the successful implementation of all components of the learning process.

Many researchers in the field of foreign language teaching methodology are engaged in issues of creating, selecting, and classifying exercises aimed at forming students' foreign language written competence. The classifications of exercises for forming written speech competence available in foreign language teaching methodology (N. Borysko, H. Raimes, J. Harmer) allow us to conclude that, in general, authors identify two main types of exercises – preparatory and speech exercises. Preparatory exercises are aimed at developing skills that underlie written speech, including transformation, compression and expansion of sentences, grouping of linguistic material according to various features, implementation of equivalent lexical and grammatical substitutions, formation

of the ability to ask questions and answer them, etc. Speech exercises are focused on the content of written utterances and involve overcoming a complex of difficulties characteristic of a particular type of written communication. The mechanisms of written text generation are implemented taking into account the author's communicative intention, that is, an idea of what exactly will be written, for whom and for what purpose; selection of linguistic means for implementing the communicative task; identification of the predicate as a supporting component of the semantic organization of the sentence; as well as establishment of inter-sentence connections through adequate selection of lexico-grammatical means (Harmer, 2015: 31–33).

In methodological science, there is also a classification of teaching aids, according to which teaching aids for teachers and teaching aids for students are distinguished; they can be non-technical and technical. According to the nature of information presentation, technical teaching aids are divided into auditory, audiovisual, and multimedia (Richards, Rodgers, 2014). Auditory teaching aids include audio supplements to textbooks, as well as various audio files used for educational purposes. Audiovisual teaching aids encompass manuals and materials designed for visual-auditory perception of information, including animated clips, video films, etc. Multimedia teaching aids involve the use of computers and the Internet and include, in particular, presentations, online applications, interactive platforms, and other digital resources.

In the course of our research, we introduce the concept of "electronic didactic means," by which we understand technical teaching aids (auditory, visual, audiovisual, multimedia) focused on the content of instruction, specially selected for the purpose of forming students' foreign language written speech competence. Researchers examine the possibilities of using such teaching aids as virtual learning (educational) environment, Internet services (email, Web 2.0 services), blogging and microblogging, as well as other digital tools that contribute to the development of foreign language communicative competence (Dudeney, Hockly, 2007; Warschauer, Matuchniak, 2010). At the same time, the use of electronic didactic means in the process of teaching written speech should be based on a student-centered approach, which manifests itself through:

– students' independence in learning (more than 50% of learning time is allocated to students' independent work in distance mode);

– reliance on existing knowledge (the process of teaching written speech is based on familiar linguistic material);

– consideration of students' interests, way and style of life (the content of tasks corresponds to age characteristics and cognitive interests);

– consideration of particularly important psychological aspects of a certain age, such as learning motivation and self-esteem (developed tasks contribute to the development and maintenance of learning motivation and formation of adequate self-esteem);

– redistribution of teacher and student roles in the educational process (student as subject of activity, teacher as integrator and facilitator).

The methodological basis for developing a methodology for teaching written speech using electronic didactic means is a set of teaching principles substantiated in the works of Ukrainian and foreign researchers. General didactic principles include the principles of consciousness, activity, visualization, consideration of individual psychological characteristics of learners, accessibility and feasibility of educational material, as well as motivation, which are described in detail in the works of S. Nikolaieva (2008: 45–52) and N. Borysko (2011: 28–34).

Methodological principles of teaching foreign language written speech include the principle of communicative orientation of teaching, the principle of stylistic differentiation, and the principle of creative orientation of the educational process. The communicative orientation of teaching as a leading methodological principle is substantiated in the works of S. Nikolaieva (1999: 96-104), as well as in the research of J. Harmer, who emphasizes the need to orient written tasks toward real communicative

situations and the text addressee (Harmer, 2015: 31-33). The principle of stylistic differentiation of written utterances and genre variability of writing is revealed in the works of N. Borysko (2011: 57-63), as well as in the works of J. Richards, which emphasizes the connection between genre, communicative purpose, and linguistic means of the text (Richards, Rodgers, 2014: 90-94).

A special role in the context of using electronic didactic means is played by special principles, including the principles of interdisciplinary and intradisciplinary integration, as well as the principle of integration of classroom and distance forms of learning (Harmer, 2015: 181-186). Let us consider the process of implementing the integrative approach in practice. Thus, the student must write a letter in response to a received letter. This task requires composing and sending to the addressee using email a written utterance in accordance with the communicative task, linguistic, sociocultural, and sociolinguistic norms of the foreign language, as well as completing a creative task (selecting appropriate music, taking or choosing photographs on a certain topic, etc.). Completing this task involves integration of:

(1) content elements of such academic subjects as computer science, country studies/geography/ literature (depending on the task theme), music;

(2) types of language activity: writing letters, reading sent letters, listening (watching videos);

(3) speech (monological utterances based on letter materials);

(4) classroom (in class) and distance (writing emails) forms of class organization.

The triad of principles is implemented in the process of students mastering the content of teaching foreign language written speech, the components of which are presented within the framework of describing the methodological system, as well as in the course of applying such electronic didactic means as Internet services (email, search engines); Internet resources (music, images, information, videos, interactive exercises); graphic files (photographs, digital drawings); multimedia presentations.

To achieve the research goal and verify the hypothesis, the following tasks are set in the work:

(1) to determine the essence and structural components of foreign language written speech competence, describe the criteria, indicators, and levels of its formation, and fill them with content;

(2) to develop a complex of electronic didactic means and a methodological system for their application in teaching foreign language written speech;

(3) to identify organizational and pedagogical conditions and stages of forming students' foreign language written speech competence using electronic didactic means.

(4) to develop a methodology for forming foreign language written speech competence based on an integrative approach and, using diagnostic tools, verify its effectiveness experimentally;

(5) to develop recommendations for teachers on forming students' foreign language written speech competence using electronic didactic means.

Material and methods of research. The methodological foundation of the research consists of the ideas of the competency-based approach in education (N. Borysko, V. Bykov, S. Nikolaieva, O. Pometun, J. Raven, A. Weinert), provisions of the communicative approach (O. Bihych, M. Byram, V. Chernysh, M. Canale, D. Hymes, S. Nikolaieva, O. Pometun, U. Steinmüller), main directions of the sociocultural approach (N. Borysko, O. Byram, C. Kramsch, M. Risager), provisions of the integrative approach (V. Bykov, L. Drake, H. Jacobs, N. Morze), and ideas of the systems approach (L. von Bertalanffy, P. Checkland, S. Goncharenko, V. Kremen). To solve the set tasks and test the proposed hypothesis, the following research methods were used:

– theoretical (analysis and generalization of psychological-pedagogical, methodological, and linguistic literature; analysis of information and educational resources of the Internet on the research problem; generalization of domestic and foreign experience in the field under study);

– empirical (questionnaires, testing, interviewing, observation, pedagogical experiment; quantitative and qualitative analysis of the results of the pedagogical experiment, statistical analysis of experimental work data).

The research was conducted at the Department of Germanic Philology and Translation Studies of the Faculty of International Relations and Law at Khmelnytskyi National University. The total sample of experiment participants consisted of 26 students from the 2nd and 3rd years (two groups of 13 students each).

Organization and stages of the research. The preparatory (prognistic) phase lasted three months (March – May 2025). During this first stage, the problem, goals, and objectives of the future research were determined, and issues related to organizing foreign language teaching for students and using electronic didactic means in the process of foreign language teaching were studied.

At the second (exploratory) stage (June – August 2025), the working hypothesis was formulated, a methodological system for using electronic didactic means in teaching foreign language written speech was developed, a methodology for forming students' foreign language written speech competence using electronic didactic means was described, and the content of experimental teaching aimed at forming students' foreign language written speech competence was determined.

The active phase of the research took place over three months (September-November 2025). During this stage, verification of the developed methodology was carried out by implementing it in foreign language teaching practice.

At the final stage (December 2025 – January 2026), conclusions and recommendations were formulated, general results of the research were summarized, and analysis of the empirical research results was conducted.

Results and their discussion. We implement the methodology for forming students' foreign language written speech competence in four stages: organizational-orientation, training with reliance on a model, productive-creative, and reflective-evaluative. The forms and types of student activities at each stage of implementing the methodology are as follows:

(1) *The organizational-orientation stage* involves initial self-assessment of the ability to produce foreign language written utterances, performing preparatory exercises, familiarization with the linguistic and organizational features of informal and business registers of written communication, as well as performing exercises on identifying the register of written communication.

(2) *The training stage* with reliance on a model encompasses reading stimulus letters sent by the instructor, writing personal response letters based on the stimulus letter as a model, performing creative tasks (selecting photographs, musical accompaniment), and improving linguistic competence through watching video lessons and performing interactive exercises. During the class, discussion of the results of distance learning sessions takes place, composing monological utterances based on the content of written letters and completed creative tasks, as well as self-assessment and peer assessment of monological utterances.

(3) *The productive-creative stage* includes reading task letters sent by the instructor, writing corresponding informal and business letters in accordance with the task, performing creative tasks (digital drawing, selecting music, photos, images), improving linguistic competence through watching video lessons and performing interactive exercises. During the class, it is necessary to discuss the results of distance learning sessions, practice monological and dialogical utterances based on the content of written letters and completed creative tasks. It is desirable for students to present their own creative works to the group and carry out self-assessment and peer assessment of monological and dialogical utterances.

(4) *The reflective-evaluative stage* is implemented through writing an electronic review in German about the work performed, completing a final creative task (collage or presentation), as well as self-assessment of the formation of the ability to produce foreign language written utterances. During the class, it is advisable to conduct a comparative analysis of the level of formation of students' written speech skills before and after training, as well as to encourage final presentations by students to the audience with a presentation of the results of completing creative tasks.

Within the framework of the proposed methodology, we define criteria for the formation of students' foreign language written speech competence, which we divide into main and auxiliary criteria. The main criteria include evaluation criteria related to the quality of students' production of foreign language written utterances: (1) mastery of methods of constructing foreign language written utterances in accordance with the communication situation; (2) formation of sociocultural and sociolinguistic competence; (3) formation of linguistic competence. As auxiliary criteria, we include high learning motivation and adequate self-esteem.

The result of implementing the proposed methodology is the formation of students' foreign language written speech competence, which is determined based on the arithmetic mean of students' indicators across all the above-mentioned criteria. The effectiveness of implementing the presented methodology has been verified through experimental research.

The proposed methodology for developing students' foreign language writing competence through a complex of electronic didactic tools was integrated into a supplementary program alongside the main curriculum, designed in accordance with the thematic content of the "Begegnungen A1" (Buscha, Szita, 2021) and "Begegnungen A2" textbook series (Buscha, Szita, 2021). Each textbook features a clear, well-structured format comprising 8 lessons (chapters), which systematically present and develop all four language skills: speaking, listening, reading, and writing. The course follows a comprehensive approach to language acquisition, with each lesson building progressively on vocabulary, grammar, and communicative competence appropriate to the A1 and A2 levels of the Common European Framework of Reference for Languages (CEFR). The "Begegnungen" series is specifically designed for adult learners and intensive German courses, making it particularly suitable for university-level instruction. The complete course package includes a main textbook (Lehrbuch) with integrated exercises, a workbook (Arbeitsbuch) for additional practice and reinforcement, a teacher's manual (Lehrerhandbuch) with methodological guidance and answer keys, audio CDs featuring native speaker recordings for listening comprehension activities as well as supplementary online exercises available on the publisher's website (Schubert-Verlag), offering interactive practice opportunities. The A1 level focuses on basic communication skills, introductions, describing daily routines, and fundamental grammatical structures, while the A2 level advances to more complex topics including past tenses, expressing opinions, making comparisons, and handling more extended conversational exchanges.

In the course of the empirical research, variable and constant conditions for conducting experimental teaching were identified. The constant conditions include:

(1) approximately equal group sizes (division of students into 2 groups; group size – 14-15 students, reduced to 13 participants in the control and experimental groups due to the fact that some students are on an individual study schedule);

(2) approximately equal initial level of foreign language proficiency of students in the control and experimental groups;

(3) equal duration of the period of studying German as a second foreign language;

(4) equal number of hours allocated to studying German as a foreign language per week (6 hours) in accordance with the curriculum;

(5) identical forms of assessment;

(6) equal number of additional classes for teaching foreign language written speech per year (27 hours, including 14 distance learning sessions).

As variable conditions, we identified the use in the EG (experimental group) of a methodology for forming students' foreign language written speech competence. In both groups, the formation of this competence was carried out during foreign language classes. However, in the EG, teaching was additionally carried out in accordance with the content of the experimental program based on our methodology. During distance learning sessions, only EG students completed tasks involving

the composition of various written speech products and sent them to the instructor using email and social networks. Let us provide examples of tasks used in forming foreign language written speech competence in EG students:

Aufgabe 1: Sommerlager. Du hast folgenden Brief von deinem Freund bekommen: *Liebe(r) … , vielen Dank für deine nette E-Mail. Ich habe mich wirklich sehr darüber gefreut. Heute habe ich eine interessante Information für dich. In der deutschen Jugendzeitschrift "Bravo" habe ich gelesen, dass für ein Sommerlager in den Alpen noch internationale Betreuer für deutsche Kinder gesucht werden, die über gute Deutschkenntnisse verfügen. Ich werde mich als Betreuer anmelden und finde es toll, wenn du mitmachen wirst. Hast du Fragen? Ich beantworte sie dir gern. Bis bald – hoffentlich in den Alpen. Es grüßt dich Christian.* Überlege dir eine E-Mail an Christian und geh auf folgende Punkte ein: (1) Wann, wo und wie lange findet das Lager statt? (2) Hast du solch eine Tätigkeit schon einmal ausgeübt und was hast du da gemacht? (3) Welche Aufgaben würdest du gern übernehmen und warum?

Aufgabe 2: Jobben in den Ferien. Michaela, 19, schreibt dir: *„In den Ferien werde ich dieses Jahr arbeiten – wie übrigens auch viele meiner Freundinnen und Freunde. Ich arbeite vier Wochen im Supermarkt. Da bekomme ich in der Stunde fast 14 Euro. Mit dem Geld möchte ich nächstes Jahr den Führerschein machen*“. Schreibe einen Antwortbrief und beachte dabei die folgenden Punkte: (1) Möchtest du auch in den Ferien arbeiten? Warum? (2) Haben auch unsere Jugendlichen Möglichkeiten eine Arbeit zu finden? (3) Deine Aktivitäten in den Ferien. Hast du schon einmal in den Ferien gejobbt? (4) Was willst du mit dem Geld machen?

Aufgabe 3: Warten auf die große Stadt. Marion, 20, der in einer kleinen Stadt wohnt, schreibt dir: "*Ich will unbedingt raus aus dieser furchtbaren Enge und mehr vom Leben mitkriegen. Sobald ich mein Bachelor habe, ziehe ich in eine richtige Großstadt. Aber ich kenne das richtige Leben in der großen Stadt noch nicht*". Nimm deine Stellung zu Marions Äußerung. In deiner Antwort solltest du auf jeden Fall folgendes erwähnen: (1) Vorteile und Nachteile der großen Stadt; (2) großes Angebot an Arbeitsplätzen; (3) Verkehr: pro, kontra; (4) kulturelles Leben und Erholungsmöglichkeiten.

The experimental research work was conducted in four stages: exploratory, ascertaining, formative, and control. At the exploratory stage, the main task was to obtain necessary information for the purpose of adjusting the process of developing educational materials and implementing the ideas of experimental teaching. At this stage, additional tasks were addressed: (1) to identify students' attitudes toward the subject "foreign language" and determine the leading motives and anti-motives for studying a foreign language; (2) to clarify students' technical capability to participate in distance learning sessions at home. Research methods at the exploratory stage included interviewing, questionnaires, and conversations. In the course of the exploratory stage research, it was found that: (1) according to questionnaire results, 57% of students in the control group (CG) and 61% of students in the EG named German among their favorite subjects, while 18% and 12% of students, respectively, included this subject in their list of least favorite subjects. The remaining students did not assign "German language" to either group. The leading motives and anti-motives of students in both groups for studying a foreign language are presented in Table 1, which shows that most motives and anti-motives of CG and EG students coincide (see Table 1).

Important motivating factors for students are interest, the teacher's personality and teaching style, as well as the necessity of mastering a foreign language in the future. Among the anti-motives (factors restraining the development of motivation), students in both groups indicated the difficulty of mastering the material and existing knowledge of English as a foreign language.

A conversation with EG students showed that 100% of students have access to the Internet at home; however, due to frequent power outages, they do not always use email. The results of the exploratory stage allowed us to adjust the methods and means of forming students' foreign language written speech competence and make clarifications and additions to the content of the proposed experimental teaching program.

Table 1

Leading motives and anti-motives of CG and EG students for studying German

Motives	CG	EG
I want to know several foreign languages	57%	61%
Knowledge of the subject is necessary for future job search	56%	59%
I like the teacher	53%	79%
Anti-motives		
The subject is difficult	34%	30%
I know English, so I don't need German	21%	20%
The subject will not be needed in the future	21%	15%

The purpose of the ascertaining stage was the initial diagnosis of the level of formation of students' foreign language written speech competence. This goal involves solving the following tasks of the ascertaining stage:

(1) to determine indicators according to the identified criteria for the formation of students' foreign language written speech competence;

(2) to determine methods for diagnosing the formation of students' foreign language written speech competence, as well as diagnostic tools;

(3) to conduct initial diagnosis of the level of formation of students' foreign language written speech competence.

In the process of solving the first task of the ascertaining stage, indicators and levels of formation of students' foreign language written speech competence were determined. Each indicator was assigned points for the purpose of unifying the obtained results. Indicators of formation according to all criteria and their corresponding points are presented in Table 2 (see Table 2).

Table 2

Criteria for the formation of foreign language written speech competence

Main Criteria		Points
Criterion 1: Mastery of methods of constructing foreign language written utterances in accordance with the communication situation (solving the communicative task)		
indicatorsи	The content of the letter fully corresponds to the tasks, the correct register of communication is chosen, the norms of linguistic behavior and communication culture accepted in the language are observed	3
	The content of the letter does not fully correspond to the tasks (more than one aspect is not disclosed), there are violations of the communication register or norms of linguistic behavior and communication culture accepted in the language	2
	The content of the letter does not correspond to the tasks (most aspects are not disclosed), the wrong communication register is chosen	1
Criterion 2: Formation of sociocultural and sociolinguistic competences		
indicators	100% – 89% correct answers (high level)	4
	88% – 75% correct answers (medium-high level)	3
	74% – 60% correct answers (medium level)	2
	59% – 40% correct answers (medium-low level)	1
	39% and fewer correct answers (low level)	0
Criterion 3: Formation of linguistic competence (language design of the text)		

Table 1 (continuance)

indicators	Vocabulary and grammatical structures correspond to the task; lexical and grammatical errors are practically absent (no more than two different types of lexico-grammatical errors are allowed)	3
	There are lexical and grammatical errors that do not complicate understanding of the content of what is written (no more than 5 different types of lexico-grammatical errors are allowed)	2
	There are numerous different types of lexico-grammatical errors (6 or more)	1
Auxiliary Criteria		
Criterion 4: High learning motivation		
indicators	100-81% of motives selected from the list (high level)	4
	80-61% of motives selected from the list (medium-high level)	3
	60-41% of motives selected from the list (medium level)	2
	40-21% of motives selected from the list (medium-low level)	1
	20% and fewer motives selected from the list (low level)	0
Criterion 5: Adequate self-esteem		
indicators	Adequate self-esteem	3
	Slightly overestimated / underestimated	2
	Inadequately high / low	1
	Maximum number of points	**17**

Based on the maximum number of points that students can obtain according to all criteria, levels of formation of students' foreign language written speech competence were identified, which are presented in Table 3 (see Table 3).

Table 3

Correlation of points and levels of formation of students' foreign language written speech competence

Level	% of maximum	Points
High	100-82	17-14
Medium-high	81-70	13-12
Medium	69-52	11-9
Medium-low	51-41	8-7
Low	40 and below	6 and below

In the course of solving the *second* task of the ascertaining stage, methods for diagnosing the level of formation of students' foreign language written speech competence were determined and its initial diagnosis was conducted. The main diagnostic methods were analysis of written works, testing, and questionnaires.

The method of analyzing written works was used to determine the level of formation of students' foreign language competence in the CG and EG according to all criteria. Students were asked to write a personal letter in response to the following stimulus letter:

Liebe(r) ...Vielen Dank für deine E-Mail. Ich freue mich sehr, dass du jetzt dein eigenes Zimmer hast. Super!

Ich war mit meiner Familie vor kurzem in den Alpen. Wir wohnten in einem Hotel. Unser Zimmer hatte einen Balkon und eine Terrasse. Wir genossen den Blick auf die Alpen und haben viele schöne Fotos gemacht. Am Tage wanderten wir in die Berge und danach saßen wir bis spät in der Nacht am Feuer und erzählten einander interessante Geschichten. Wir hatten eine sehr schöne Zeit zusammen.

Reist du gern? Was machst du gewöhnlich am Wochenende? Welche Städte hast du schon besucht? Wohin fährst du in den Ferien?

Schreib mir bald.

Schöne Grüße

Anna

The results of the initial diagnosis of CG and EG students to determine the level of formation of foreign language written speech competence are presented in Figure 1 (see Fig. 1).

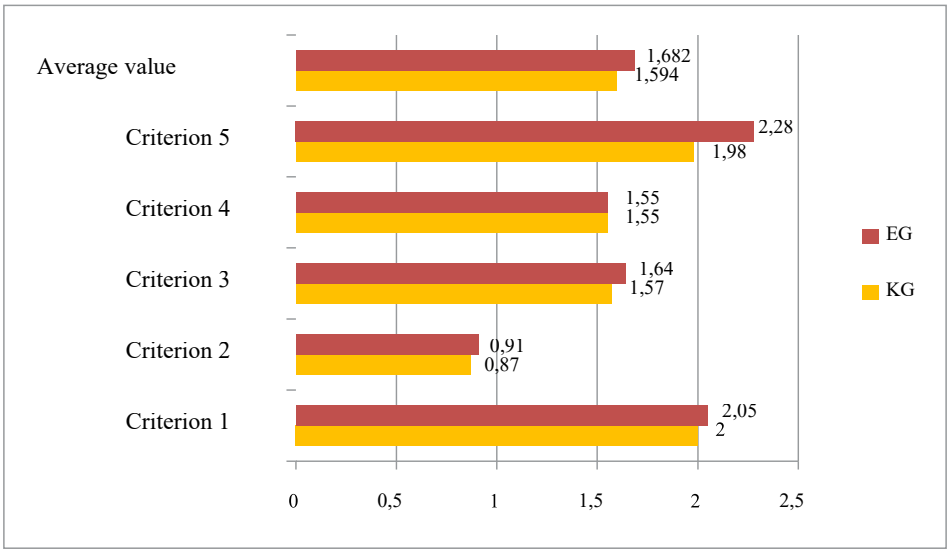

Fig. 1. Comparative analysis of average indicator values of CG and EG students according to criteria for the formation of foreign language written speech competence

The results of the initial diagnosis of the level of formation of foreign language written speech competence of CG and EG students presented in Fig. 1 indicate that students in both samples have approximately the same level of its formation. The highest results were obtained according to criteria 1 "Solving the communicative task" and 5 "Adequate self-esteem." Certain problems for students were caused by test tasks to determine the level of formation of sociocultural and sociolinguistic competence (criterion 2). High and medium-high levels were identified in only 16% of CG students and 14% of EG students.

The average score that students in both groups obtained according to all criteria was 8.4 points, which constitutes 49% completion and corresponds to an overall medium-low level of formation of students' foreign language written speech competence. Taking into account the obtained data, corrections were made to the previously developed experimental teaching program in order to increase the effectiveness of the process of forming foreign language written speech competence in EG students.

The purpose of the formative stage was to implement the methodology for forming foreign language written speech competence using electronic didactic means and its integration into the educational process. The proposed methodology for forming students' foreign language written speech competence using electronic didactic means was implemented in four stages: (1) organizational-orientation; (2) training with reliance on a model; (3) productive-creative; (4) reflective-evaluative stages. A supplementary training program was developed in addition to the main program, which includes 27 classes, 13 of which are classroom-based and 14 are distance learning sessions. Let us proceed to describing the content of each stage of implementing the experimental program.

The purpose of the organizational-orientation stage was to familiarize students with the rules for writing letters taking into account the communication register. This stage included 6 classroom sessions in which students conducted self-assessment of their ability to produce written utterances using the scaling method, performed preparatory (training) exercises on expanding and reducing sentences, filling in gaps with missing words, constructing sentences, etc., became familiar with existing registers of written communication, learned to identify the register of written communication, and became familiar with the rules of electronic correspondence and the use of email services. This stage concluded with a classroom session in which students discussed the results of distance learning sessions, created monological utterances based on the content of written letters (working in pairs and groups), conducted self-assessment of their activities and peer assessment of each other's monological utterances using evaluation forms, and became familiar with the tasks for the next distance learning stage.

The purpose of the productive-creative stage was to teach the production of written utterances taking into account different communication registers. This stage included 10 distance learning sessions and 4 classroom sessions, which alternated so that after 2-3 distance learning sessions on one topic there was a classroom session where students had the opportunity to activate the material created during distance learning sessions in oral speech. The productive-creative stage of the developed program is the longest in implementation. Each topic is allocated 2-3 distance learning and 1 classroom session, which the instructor can integrate into the educational process. During the distance learning sessions of this stage, students read task letters sent by the instructor, wrote response letters according to the received task (for example, write a letter to a person in a photograph, correctly choosing the communication register), performed creative tasks (for example, draw a logo or emblem, illustrate a poem with music, etc.), watched language video lessons sent by the instructor (specifically tailored to the language errors students made), and performed interactive language exercises, links to which were sent by the teacher.

During the classroom sessions of this stage, students discussed the results of the distance learning sessions conducted, created monological utterances based on the content of written letters (working in pairs and groups), presented their creative works to the class, and conducted self-assessment of their activities and peer assessment of each other's monological utterances using evaluation forms.

If a student made lexico-grammatical errors in the letter text, along with the next task, the instructor sent the student links to educational language video lessons and interactive exercises aimed at improving students' linguistic competence specifically in those aspects of the language that caused them difficulties. Thus, in the process of experimental research work, video lessons and interactive exercises on the following topics were used: conjugation of verbs in the present tense with root vowel change, use of perfect tense with haben and sein, modal verbs, articles, prepositions of place, time, direction, conditional sentences, etc.

The purpose of the reflective-evaluative stage was to improve students' communicative and evaluative competences. This stage included one distance learning session and two classroom sessions. During the distance learning session, students wrote a review of the work performed in their native language using email, and completed a final creative task (collage, multimedia presentation, drawing, etc.) reflecting the results of the student's foreign language speech activity.

During the classroom sessions of the reflective-evaluative stage, students conducted self-assessment of their ability to produce written utterances using the scaling method, performed a comparative analysis of self-assessment results before and after implementation of the developed training program, and made presentations to the group summarizing their learning and presenting their creative works.

Next, we will characterize the content of the control stage of the experimental teaching. The purpose of the control stage of the experimental teaching is the final determination of the level of formation of students' foreign language writing competence after the implementation of the experimental teaching program. The main diagnostic tools, as in the ascertaining stage of the experiment, were

the analysis of students' written works, testing, and questionnaires. The method of analyzing written works was applied to determine the level of formation of foreign language writing competence of students in the CG and EG according to all criteria. Students were asked to write a personal letter in response to a stimulus letter. Using the testing method, the final level of formation of students' sociocultural and sociolinguistic competence was determined, as well as students' self-assessment after the implementation of the proposed teaching program. In order to identify the final level of formation of students' sociocultural and sociolinguistic competence, we used the same test tasks aimed at identifying students' knowledge of common sociocultural and sociolinguistic realities. Figure 2 presents a comparative analysis of the mean values of results of students from both samples according to all criteria at the control stage.

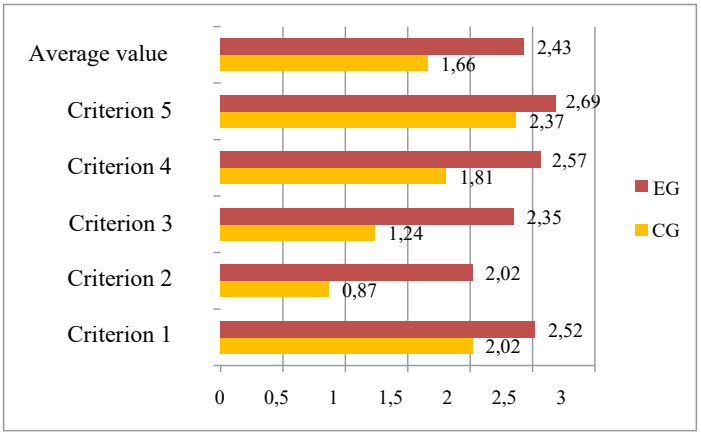

Fig. 2. Comparative analysis of mean values of results of CG and EG students according to the criteria of formation of foreign language writing competence at the control stage (after training)

The analysis of the results of the secondary diagnostics of the level of formation of foreign language writing competence of CG and EG students presented in Fig. 2 indicates that the average score of the EG test according to all criteria exceeds the mean values obtained as a result of studying the level of formation of foreign language writing competence of CG students. The mean value of EG indicators according to all criteria of formation of foreign language writing competence is 2.43 points, which exceeds the mean value (1.66) according to all criteria of the CG test by 32%. Fig. 3 presents a comparative analysis of indicators of formation of foreign language writing competence of CG and EG students by levels, obtained at the control stage of the experiment.

The data presented in Figure 3 allow us to state that the majority of EG students after the implementation of the experimental work showed a fairly high level of formation of foreign language writing competence (from medium to high).

The majority of students in the control sample at the control stage showed a level of formation of foreign language writing competence from medium to low. The average score of EG students according to all criteria was 12.1, which corresponds to 71% completion and an overall medium-high level of formation of foreign language writing competence. The average score of students in the control sample according to all criteria was 8.6 points (50% completion), which corresponds to an overall medium-low level of formation of foreign language writing competence. Thus, the results of the control stage of the experiment show that students in the experimental group have a higher level of formation of foreign language writing competence according to all criteria compared to students in the control sample.

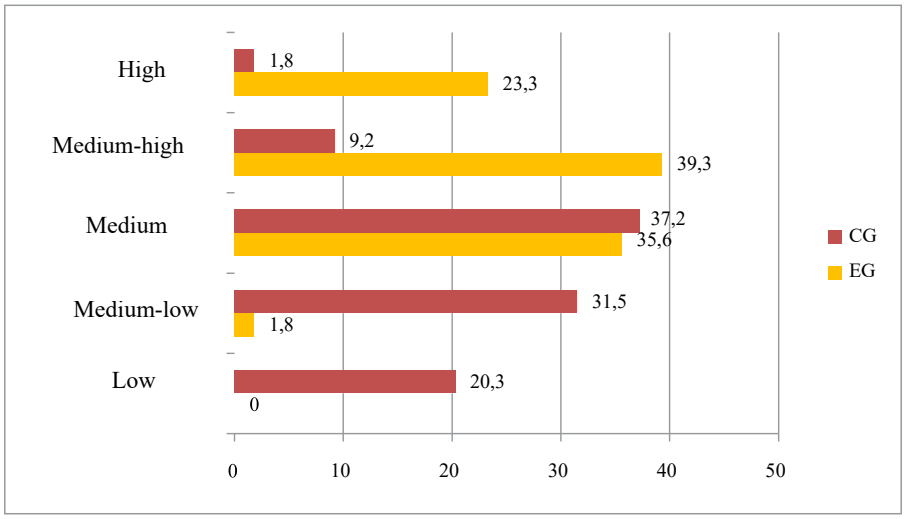

Fig. 3. Comparative analysis of levels of formation of foreign language writing competence of CG and EG students (in% of students) at the control stage (after training)

The comparative analysis of indicators of formation of foreign language writing competence of EG and CG students at the ascertaining and control stages of the experiment, which allows us to draw a conclusion about the effectiveness of the methodology we developed, involves the use of precise research methods, in particular, various types of distributions of observed values and statistical correlations. In the study, we use the χ2 (chi-square) criterion and statistical distributions based on the diversification law. Using the χ2 criterion, one can determine the presence of correspondences/ discrepancies between the distributions of frequencies of observed values (Levyts′kyi, 2012: 156). The sum of χ2 is higher the more the empirical values deviate from the theoretical ones. Critical values of χ2 sums at certain degrees of freedom are given in special tables (Levyts′kyi, 2012: 172–176).

In the study, all data for analysis were reduced by a computer program to an alternative distribution, that is, to four-field tables. In this case, the number of degrees of freedom equals one, and the critical value for all tables is χ2 0.05 = 3.84. Values of χ2 sums higher than 3.84 indicate that empirical values exceed theoretically expected ones. The sum of χ2 is higher the more the empirical values deviate from the theoretical ones (cf. Levyts′kyi, 2012: 158–159). The sum of χ2 allows us to establish only the presence/absence of a relationship between the studied values, but not its measure. The latter is determined using Chuprov's coefficient of mutual contingency K for multi-field tables. The values of the coefficient of mutual contingency can range from 0 to 1, and significance is established by the value of χ2 (Levyts′kyi, 2012: 156–160). The obtained calculated results are presented in Table 4 (see Table 4).

From the data presented in Table 4, it can be seen that the calculations of Chuprov's contingency criterion did not reveal significant differences between the values of the studied CG and EG according to any of the indicated criteria, which confirms the approximately equal level of formation of foreign language writing competence of students in both groups before conducting the experimental teaching. The single existing value of the criterion χ2 0.05 = 0.01 is significantly lower than the critical value χ2 0.05 = 3.84, therefore it has no statistical significance.

At the control stage of the experiment, a repeated diagnostics of the level of formation of foreign language writing competence of students in both groups was conducted using the same methods and under the same conditions. A comparative analysis of students' results according to the criteria of formation of foreign language writing competence in the experimental and control groups after the implementation of the experimental teaching program is presented in Table 5 (see Table 5).

Table 4

Comparison of values according to the criteria of formation of foreign language writing competence in CG and EG at the ascertaining stage (before training)

Criterion of formation of students' foreign language writing competence		Mean value		Contingency criterion	
		CG	EG	CG	EG
1	Mastery of ways of constructing foreign language written expression in accordance with the communication situation	2	2,05	–	–
2	Formation of sociocultural and sociolinguistic competence	0,87	0,91	–	–
3	Formation of linguistic competence	1,57	1,62	–	–
4	High motivation	1,55	1,55	–	–
5	Adequate self-assessment	1,98	2,28	–	$\chi 2\ 0,5 = 0,01$

Table 5

Comparative analysis of criteria of formation of foreign language writing competence in CG and EG at the control stage (after training)

Criterion of formation of students' foreign language writing competence		Mean value		Contingency criterion	
		CG	EG	CG	EG
1	Mastery of ways of constructing foreign language written expression in accordance with the communication situation	2,02	2,52		$\chi^2_{0,5} = 4,36$ K = 0,03
2	Formation of sociocultural and sociolinguistic competence	0,87	2,02		$\chi^2_{0,5} = 6,54$ K=0,05
3	Formation of linguistic competence	1,24	2,35		$\chi^2_{0,5} = 3,67$ K=0,02
4	High motivation	1,81	2,57		$\chi^2_{0,5} = 3,01$ K=0,01
5	Adequate self-assessment	2,37	2,69	$\chi^2_{0,5} = 1,08$	

Statistical calculations revealed that the differences in indicators of the level of formation of foreign language writing competence of EG and CG students after the implementation of the experimental teaching are within the zone of statistical significance. We can conclude that after the implementation of the proposed methodology, EG students improved their results according to all criteria of formation of foreign language writing competence. The level of formation of foreign language writing competence of CG students did not change significantly. In the EG at the ascertaining and control stages, we identified a significant increase in the number of students with high and medium-high levels (from 14.4% to 62.6%) and a decrease in the number of students at medium-low and low levels (from 58.8% to 1.8%). The number of EG students at the medium level changed toward an increase, but not as significantly.

Overall, the results obtained during the experiment confirm our assumption that the developed methodology for forming students' foreign language writing competence using electronic didactic tools is effective. Thus, it can be considered that the goal of the study has been achieved, and the hypothesis has been confirmed.

Conclusions. Foreign language writing competence is a complex multi-component structure that encompasses linguistic, pragmatic, sociolinguistic, and sociocultural components. Each of these components performs a specific function in the process of generating written expression in a foreign language and requires purposeful and systematic formation. This necessitates a comprehensive approach to teaching foreign language writing that goes beyond purely linguistic training and takes into account the communicative, cultural, and social aspects of speech activity.

In the course of the research, a methodology for the gradual formation of students' foreign language writing competence using electronic didactic tools was theoretically substantiated and developed. The proposed methodology is based on a combination of modern methodological approaches, including integrative, communicative, and systemic approaches, and is implemented in accordance with the principles of interdisciplinary integration, intradisciplinary integration, and integration of classroom and distance learning forms. These principles ensure the integrity of the educational process, the interconnection of different types of speech activity, and the effective combination of traditional and digital forms of learning.

The methodology for forming foreign language writing competence includes four interrelated stages: training, writing with model support, independent productive writing, and reflective-evaluative stages. The step-by-step organization of the educational process ensures a gradual transition from reproductive activity to creative use of foreign language writing skills, promotes students' awareness of their own achievements and difficulties, and develops self-assessment skills.

An important result of the research was the creation of a methodological system for using electronic didactic tools in teaching foreign language writing. This system is based on the interaction of learning objectives, learning content, electronic didactic tools, and organizational-pedagogical conditions for forming foreign language writing competence. It has been proven that the effectiveness of forming this competence depends largely on the appropriate selection and purposeful use of different groups of electronic learning tools.

Within the framework of the proposed methodology, the functional role of each group of electronic didactic tools in forming the components of foreign language writing has been defined. In particular, Internet resources (video lessons, interactive exercises) are most effective for developing the linguistic component; graphic files (photographs, digital images) serve as support for forming the pragmatic component of written expression; multimedia presentations and Internet resources with audio and video materials contribute to the development of sociocultural and sociolinguistic components. The use of Internet services, particularly email, ensures the implementation of real written communication and increases the authenticity of the educational process.

Based on the developed methodology, an additional program for forming foreign language writing competence for undergraduate students was created. The program covers four stages (organizational-preparatory, training with model support, productive-creative, reflective-evaluative) and is implemented over 27 academic hours. The implementation of this program in the educational process demonstrated its high effectiveness.

The results of the experimental work confirmed the positive dynamics of the level of formation of students' foreign language writing competence according to all defined criteria. Specifically, an increase in the level of mastery of ways of constructing foreign language written expression in accordance with the communication situation was recorded, as well as growth in indicators of formation of linguistic, sociocultural, and sociolinguistic competences, increased learning motivation, and formation of adequate student self-assessment.

Statistical processing of the experiment results using non-parametric statistical methods (chi-square test, coefficient of mutual contingency K) revealed differences at a high level of statistical significance between the control and experimental groups. This provides grounds to assert that the hypothesis about the effectiveness of using electronic didactic tools in forming students' foreign language writing competence has found empirical confirmation, and the goal of the research has been achieved.

Prospects for further scientific research are seen in developing methodologies for forming other types of speech activity and general speech competence using alternative or expanded sets of electronic didactic tools, as well as in studying the possibilities of their integration into various educational contexts.

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THE CHALLENGE OF CONTENT AND CONTEXTUALIZATION IN ESP FOR CHRISTIAN STUDENTS

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Abstract. This article examines the specialized methodology of teaching Foreign Language for Professional Purposes (FLPP) to students in Christian degree programs. It explores how professional language competencies are developed within a framework of Christian professions needs and peculiarities, highlighting the unique educational environment of religious universities.

The professional needs of Christian students necessitate a distinct approach to English language instruction. As this field is still developing, ongoing scientific analysis, research, and discussion are necessary to refine our understanding of the specific content needed for English-language materials within a Christian educational context, and to discover effective methods for maximizing teaching effectiveness by leveraging all available relevant characteristics.

The methodological basis of the research is built upon an interdisciplinary framework that integrates pedagogical theories with a specialized spiritual orientation. The study details several critical pedagogical aspects, including: vocabulary and terminology: identifying the specific linguistic challenges of religious and professional terminology; curriculum and content: selecting primary sources and Christian literature that provide necessary cultural context while fostering professional thinking rooted in faith; instructional methods: emphasizing communicative and interactive approaches tailored to the needs of students preparing for global service; intercultural competence: training students to navigate diverse cultural landscapes through an ethical, faith-based lens.

As a result, the authors conclude that effective language instruction in this context requires a holistic integration of specific content, contextualization and methodology, as well as professional skills and spiritual values. The goal is to develop specialists capable of utilizing their language proficiency for professional communication, professional service and spiritual growth in a globalized world.

Key words: Foreign Language for Professional Purposes, professional language competencies, contextualization, foreign language skills, career-specific tasks, holistic integration, communicative approach.

Introduction. In the era of rapid technological growth and global integration, proficiency in foreign languages has evolved from a secondary asset into an essential requirement for professional survival. In different professional fields, linguistic skills enable practitioners to analyze new scientific information, navigate cross-border relations, remain competitive in international professional space. Be it an economist, a lawyer, or a diplomat, multilingualism is the foundation for effective negotiation and international cooperation, helping professionals build trust by engaging with local cultures and stakeholders in their native tongues.

For future theologians and clergy, mastering English has become critical for bridging the gap between local ministry and the global Christian community. It provides direct access to a vast body of global theological research and primary sources that are often available only in English as a modern lingua franca. Engaging with

academic literature and historical religious texts in English allows students to gain a profound understanding of modern professional trends and cross-cultural perspectives, particularly in the context of World Christianity (Anderson, M., 20212; Binkley, S., 2007; David I. Smith, 2020). Furthermore, specialized language training equips these students with vital communication skills for:

– missionary work: language is a spiritual tool that allows missionaries to share the gospel in a way that resonates with a community's "heart language," fostering deeper relationships and mutual respect.

– public speaking and preaching: training in public speaking and rhetoric enhances the delivery and organization of sermons, making them more impactful for diverse audiences.

– global academic dialogue: proficiency transforms a theologian into a globally connected scholar. For example, major international conferences – such as the Global Conference on Christian Scholarship in Nairobi or the International Conference on Theology, Doctrine, and Spiritual Traditions – provide platforms where English is essential for presenting peer-reviewed research and networking with international peers (Pennycook, A., & Coutand-Marin, S., 2003).

Ultimately, these skills ensure that religious leaders can effectively participate in the worldwide Christian community, contributing their unique insights to global theological dialogue while remaining grounded in their local contexts.

For students at a Christian university, English language acquisition is uniquely shaped by their specific vocational objectives and professional requirements. This educational process is increasingly viewed as a specialized field that demands rigorous academic inquiry and evidence-based justification. To maximize instructional success, research must focus on the distinct pedagogical nuances of the specific professional setting, ensuring that curricula are precisely aligned with the unique academic needs of the learners. Scientific analysis identifies some persistent barriers to effective instruction in faith-based institutions:

– Curriculum Realignment: Studies highlight the need for a "scientific justification" of curricula to ensure they meet the unique needs of clergy, such as preaching and public speaking.

– Professional Development: Research indicates a gap in students training, specifically regarding how to embed professional language needs into the specific pedagogical practice of a theology department.

– Contextualization: Linking language learning directly to professional activities and content. Contextualization is putting language items into a meaningful and real context rather than being treated as isolated items of language for language manipulation practice only.

Precisely these aspects of ESP and their specific design in the learning process for Christian students are **the objectives** of the present study.

The core **methodological pillars** identified in the research include *Competency-Based Approach*: The research focuses on the formation of "foreign language professional competencies," specifically tailored for students of Christian specialties. *Communicative approach*: the study emphasizes the "communicative approach" as a primary method for language acquisition. *Interactive teaching methods*: the research promotes the use of "interactive methods" to ensure effective training and student engagement. *Professionally Oriented Approach*: the methodology is designed to integrate foreign language training with specific professional needs (ESP – English for Specific Purposes) relevant to Christian ministry and service. *Integration Strategy* – the overarching methodological principle is the integration of professional foreign language training with professional needs and requirements, to develop a "holistic personality" capable of using language for ethical communication and service in a globalized world.

Analytical **methods** include comparative and structural analysis: the authors analyze the "uniqueness" and "specifics" of teaching in a Christian institution across several aspects: vocabulary, terminology, topic range, and educational literature selection; linguistic and cultural analysis: the study evaluates Christian literature as a "linguistic and cultural source," examining how primary sources reveal Christian culture and worldview to form professional thinking.

Main part. In the globalized landscape of modern world the landscape of higher education has been fundamentally reshaped by global integration and the rapid rise of specialized communication tools. For Christian universities, this evolution has placed a spotlight on a critical pedagogical hurdle: the problem of content and contextualization in teaching English for Professional Purposes (EPP) to theology and ministry students.

Lexical Gaps. First of all, this is a specialized vocabulary that students study, related to the understanding of religious and theological concepts, biblical texts. Religious vocabulary is studied here not as part of general culture or literature, but in connection with church history, dogmatics, ethics, biblical studies, with an emphasis on key concepts such as Faith, Grace, Salvation, the Kingdom of God, their evolution and various theological interpretations. At the end of their studies, students should be able to read, understand and discuss texts related to theology in English, use this vocabulary in real communication: worship services, missionary work, academic discussions, religious journalism. Thus, the main specificity of vocabulary acquisition in a Christian university is the combination of secular and spiritual dimensions, requiring not only linguistic but also deep theological knowledge, and the main problem is the multi-layeredness of meanings, cultural specificity, and the need to understand the context of Scripture (Nykiforchuk Zh. V., Labinska B. I.. 2021).

The research shows that the special characteristics of the vocabulary studied at a Christian university include:

• Ambiguity and symbolism: Biblical words often have deep symbolic and metaphorical meanings that are not conveyed by a single equivalent in modern language (e.g., "blood," "light," "truth").

• Cultural and historical context: The vocabulary is related to the realities of the Ancient Near East that are foreign to the modern student (names, geographical names, customs).

• Archaic language: Many words, although used, have somewhat changed or outdated meanings compared to their original biblical context.

• Polysemy and homonymy: The same word can have different meanings depending on the translation and the biblical book.

• Translation differences: Students are faced with different versions of translations that may convey the meaning of the original languages (Greek, Hebrew) differently.

• Theological accuracy: Choosing the right word is crucial to understanding doctrines.

• Integration with other subjects: It is necessary to simultaneously study a foreign language, theology, and hermeneutics (interpretation of Scripture) (Nykiforchuk Zh. V., Labinska B. I.. 2021).

Such features of the lexical composition, important for students of a Christian university, are closely related to the features of the subject matter of professional English, which includes Biblical and theological topics, Christian doctrines, such as Anthropology, Soteriology, Hamartiology in the context of a foreign language. This also includes topics related to Christian ethics and morality – discussion of the topics human behavior and relationships in the light of faith. Also necessary are topics on intercultural communication, understanding professional communication in different cultures. An important component of professional foreign language in a Christian university is topics related to sermons, missionary work, and volunteering, mastering the skills and abilities of using a foreign language in these types of professional activity, as well as mastering an academic foreign language for writing essays, abstracts, reports on theological topics, and participating in conferences (Anderson, M.,20212; Binkley, S., 2007).

Genre Specificity. Christian specialists must master unique genres – the sermon (homiletics), the academic paper, and the pastoral letter. Traditional language teaching often ignores these distinct rhetorical structures, leaving students ill-equipped for professional public speaking.

The Challenge of Contextualization. Special requirements for the lexical composition and topics of a foreign language of professional orientation in a Christian university also determine the specific selection of educational literature, which should offer an appropriate context in which language learning takes place. This means the use of texts that include biblical plots, Christian literature, hagiography, as well as materials that reveal Christian culture and worldview. Textbooks should contain topics related to faith, morality, service, and family, which forms not only communicative but also spiritual competence.

• Using the primary source: using passages from the Bible to study language, vocabulary and grammar; analysis of biblical texts; analysis of parables, psalms, epistles of the apostles from the point of view of linguistics and theology.

• Christian literature: works of famous Christian authors (C. Lewis, J. Tolkien, contemporary writers); psalms, prayers, quotes from sermons, which enrich the vocabulary with high style and foreign language material for the development of reading skills and understanding of the cultural context.

• Christian music and films: analysis of lyrics of songs, hymns, sermons.

Thus, educational materials in Christian universities are not just language textbooks, but a tool for the formation of a holistic language knowledge that combines language proficiency in all possible aspects and practical professional skills (David I. Smith, 2020; Kostyk YE. V., Silyutina I. O.; Orlova N. 2019).

Methodological Shifts. Before proceeding to the consideration of the methodology of teaching a professional foreign language in a Christian university, we note that it is based on such modern approaches and concepts as: a communicative approach, the main goal of which is the formation of communicative competence, i.e. mastering the language as a means of intercultural communication, and not only knowledge of grammar and vocabulary; dialogue of cultures, which implies understanding and interaction with other cultures through language; professionally oriented learning (ESP/EAP), i.e., adaptation of language learning to the specific needs of students of specific specialties; innovative methods – the use of modern technologies and the integration of professional disciplines with language ones (interdisciplinary coordination) (Herasymchuk, H. A., Koval′chuk, O. M., Mel′nychuk, O. V.. 2024; Orlova N., 2019; Shevchenko S. P., 2020). According to the communicative approach, we define the *main principles* of teaching a professional foreign language: priority of communication – the main goal is to learn to speak, listen, read and write in order to realize oneself in communication, overcoming the language barrier; situationality – learning through the creation of realistic language situations (role-playing games, discussions); active interaction – active communication; holistic language processing – simultaneous development of all language skills (speaking, listening, reading, writing), and practical, rather than theoretical, study of grammar; speech and mental activity – emphasis on the spontaneous formation of thoughts and their expression in a foreign language without constant translation; authentic materials – the use of real texts, recordings, videos for immersion in the language environment. This approach helps students not only to know the language, but also to use it confidently, convey their thoughts, understand the interlocutor and function in a foreign language environment, which is especially important in the context of European integration (Orlova N., 2019; Shevchenko S. P., 2020).

These characteristics also determine the specifics of the methods of teaching a professional foreign language in a Christian university:

• Interpretation: Analysis of texts from the perspective of professional point of view.

• Contextual approach: Study of words in the context of biblical texts, their original meanings and development, as well as comparison with other religious or secular concepts.

• Doctrinal analysis: Analysis of key biblical terms through the prism of theological disciplines (anthropology, soteriology), which helps to understand their content more deeply.

• Structural-semantic analysis: Study of functional-semantic fields of religious vocabulary, identifying their semantic processes and features of functioning in language.

• Dialogue of worldviews: Teaching students to conduct a dialogue with representatives of other worldviews, arguing for a biblical position, which requires a deep understanding of both language and content.

• Media Literacy: Understanding the transformation of religious communication under the influence of mass culture and media, which includes the analysis of contemporary narratives.

• Discussions: Discussing current issues through the prism of Christian values (e.g., family values, service).

• Creative tasks: Creating translations, essays, presentations on spiritual topics.

• Lecture-discussion: Discussing biblical texts and their relevance today.

• Case method: Examining real-life situations where biblical terms and principles need to be applied.

• Project work: Creating content (articles, videos) on biblical topics in a foreign language.

• Task-Based Learning, which involves learning a language through completing real-life, meaningful tasks that simulate real-life situations to develop practical communication skills.

• Guided Discovery, when instead of directly explaining the rules, the teacher offers students tasks, examples and tips that encourage them to "discover" the rules, properties or patterns themselves, which makes learning more conscious and effective. This is combined with game and communicative approaches, contributing to better assimilation of the material.

• The use of visual methods and TOR, the involvement of emotions to increase the efficiency of memorization, which is consistent with the physiological aspects of learning.

Thus, for studying a foreign language at a Christian university, it is recommended to combine communicative methods with technologies that take into account specific professional content and aims, as well as to apply

innovative approaches, digital resources, visual methods, and individualization, focusing on practical application.

Results and Discussions. Taking into consideration the above, it can be argued that the main features of teaching a professionally oriented foreign language in a Christian university are:

– integration of learning and professional training: using biblical texts as a basis for studying vocabulary and grammar; discussing Christian themes, values, and ethics through a foreign language; studying English through songs, sermons, and historical documents.

– development of personality and vocation: emphasis on character formation, responsibility, and service; language is viewed not simply as a skill, but as a tool for missionary work and intercultural communication.

– worldview approach: communicative tasks are often related to a Christian perspective (for example, discussing social issues, moral dilemmas from a faith perspective); selection of authentic materials.

In accordance with the above needs, we define the following goals for teaching a professional foreign language at a Christian university:

– communicative competence: mastering the language as a tool for communication in the dialogue of cultures, with an emphasis on Christian values.

– personality formation: development of tolerance, critical thinking and understanding of world trends through the prism of faith; formation of also Christian worldview competence; preparation for international work (missions, charity) and effective communication in the global Christian environment.

– spiritual development: using language for a deeper understanding of the Holy Scriptures and the formation of a Christian worldview; developing critical thinking through the prism of biblical truths.

As for teaching methods, the communicative methodology remains key (interaction, cooperation, communication), but with the addition of a spiritual dimension. Language is studied as a tool for intercultural communication and exchange of values, which meets modern requirements. In this case, the methods are aimed not only at acquiring foreign language skills, but also at forming practical skills and experience.

Conclusions. As a result of the study, we can conclude that the future of foreign language education in Christian institutions depends on moving away from a one-size-fits-all approach. By scientifically justifying the content (ESP) and rigorously applying principles of contextualization, educators can ensure that future Christian specialists are not just "fluent" in English, but are capable of serving as authentic, globally connected practitioners and researchers.

The problem of content and contextualization is a call for educational integrity. To prepare the next generation of Christian specialists, institutions must shift toward a discipline-driven model – one that justifies every lesson through the lens of professional necessity and spiritual formation. Only by deeply integrating professional content with an authentic faith context can educators transform English from a mere subject into a powerful instrument for global ministry.

Thus, Christian higher education institutions strive to modernize their language curricula and to overcome a critical content selection and contextualization challenge. The main feature here is a holistic approach, where language is not an end in itself, but a means of cognition, self-expression and service, integrating intellectual development with spiritual. Language study is connected with the professional needs and cultural studies, which gives a deep understanding of the context and contributes to intercultural competence.

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SKI RACING AS A MEANS OF INCREASING PHYSICAL ACTIVITY AMONG HEARING IMPAIRED PUPILS AT SCHOOL

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Abstract. The article examines the pedagogical feasibility of using ski races as a means of increasing the physical activity of students with hearing impairments in general secondary education institutions. The work uses analysis and generalization of scientific and methodological literature on adaptive physical education and inclusive education, as well as pedagogical observation, analysis of school documentation, and interviews with physical education teachers. It has been established that the organization of ski racing within physical education lessons, taking into account the psychophysical characteristics of students with hearing impairments, the use of visual teaching aids, and the step-by-step mastery of technique contributes to an increase in the level of physical activity and student engagement in classes. It was concluded that it is advisable to integrate ski racing into the variable part of physical education curricula. Prospects for further research are related to the quantitative assessment of the impact of ski racing on the indicators of motor fitness and functional status of students with hearing impairments.

Key words: ski racing, students, hearing impairment, physical activity, physical education, general education schools.

Introduction. Physical activity is a key factor in the motor development, health, and social adaptation of children and adolescents. It is particularly important for students with hearing impairments, as it combines motor development with the formation of communication and social skills. However, numerous studies indicate a systematic decline in physical activity among this category of schoolchildren, which is due to limited access to various types of physical activity, difficulties in learning traditional forms of educational material, and insufficient adaptation of physical education lessons (Roland et al., 2016; Marschark & Spencer, 2019; Troianovska, 2025; Nosko & Troianovska, 2025).

In global scientific literature, cyclic types of physical activity are considered an effective means of developing endurance, coordination, and overall physical performance in schoolchildren. Particular attention is paid to the use of winter sports, in particular cross-country skiing, which combines aerobic exercise, outdoor activities, and the ability to adapt the intensity of the exercise to the individual characteristics of students (Biewener & Roberts, 2018; Janssen & LeBlanc, 2019). Despite this, the issue of introducing cross-country skiing into the systematic physical education practice of students with hearing impairments remains understudied, especially in the context of organizing physical education classes in general secondary education institutions.

The relevance of the study is determined by the need to develop methodologically sound approaches to increasing the physical activity of students with hearing impairments, which will contribute to their motor development, social integration, and the formation of sustained motivation for systematic physical exercise.

Research objectives:

– to analyze the current state of the problem of physical activity among students with hearing impairments in global and domestic scientific literature.

– To determine the pedagogical possibilities of ski racing as a cyclical type of physical activity for students with hearing impairments.

– To investigate organizational and methodological approaches to the introduction of ski racing into the structure of physical education lessons.

– To develop recommendations for optimizing the organization and methodology of ski racing in physical education lessons.

Purpose of the study is to theoretically substantiate and determine the pedagogical feasibility of using ski races as a means of increasing the level of physical activity of students with hearing impairments in general secondary education institutions.

To achieve the stated goal of the study, a set of interrelated research **methods** was used:

Theoretical methods, in particular, analysis, synthesis, generalization, and systematization of scientific and methodological literature on adaptive physical culture, inclusive education, physical education, and the use of winter sports in the educational process. This made it possible to determine the pedagogical possibilities of ski racing and justify its relevance in working with students with hearing impairments.

Empirical methods, namely pedagogical observation of students' learning activities in physical education classes, discussions with physical education teachers, and analysis of school documentation (curricula, calendar and thematic planning, individual educational trajectories of students).

Results. In the process of theoretical analysis of scientific and methodological literature (Baikina, Kret & Sylantiev, 2002; Hurinovych, 2006; Troianovska & Lazarenko, 2025), it was found that the effectiveness of physical education for students with hearing impairments largely depends on the rational organization of physical education classes and the selection of types of physical activity that provide an optimal level of physical exertion, correspond to the age and psychophysical characteristics of schoolchildren, and contribute to increasing their physical activity. In this context, cross-country skiing is considered a useful tool that combines health benefits, accessibility, and the ability to adapt to the conditions of an inclusive educational environment.

An analysis of pedagogical approaches to organizing ski training has made it possible to identify the main structural components of a physical education lesson with elements of ski racing. These include a preparatory part aimed at general and specific warm-up of muscle groups, a main part in which skiing techniques are taught and improved, and a final part that ensures a gradual reduction in physical activity and recovery of the students' bodies. This structuring of the lesson contributes to increasing the motor density of the classes and creates conditions for the targeted development of motor skills.

Particular attention was paid to organizing the learning process taking into account the specific educational needs of students with hearing impairments. During the ski race in physical education class, visual cues, demonstration materials, and sign language were used to ensure a clear understanding of the tasks and the sequence of movements. Step-by-step instruction in skiing technique allowed students to gradually develop motor skills and reduce the risk of mistakes and injuries.

Pedagogical observation of physical education lessons using ski races showed that clear planning of the distance, determination of the start and finish points, and rational distribution of students into subgroups contribute to the orderliness of the educational process and increase the level of physical activity. Organizing movement along the distance, taking into account the individual pace of exercise performance, allowed each student to work in a comfortable mode, which had a positive effect on the total amount of physical work performed.

During the implementation of ski races as part of physical education lessons, special attention was paid to compliance with safety requirements (Troianovska, 2018). Before the start of classes, safety instructions were given, sports equipment was checked for serviceability, and equipment was checked for suitability for weather conditions. This approach helped to foster a responsible attitude toward physical exercise among students and created the conditions for stable learning activities.

Discussions with physical education teachers helped identify the pedagogical conditions under which organizing ski races in class is most effective. These include systematic training, gradually increasing the difficulty of training tasks, taking into account the physical fitness level of students, and using an individualized approach. Teachers also noted that the inclusion of competitive elements in the lesson helps to increase students' interest in the classes and encourages them to participate more actively in the learning process.

Analysis of educational programs and calendar-thematic planning confirmed the possibility of integrating ski racing into physical education lessons as a variable module. The generalization of theoretical provisions and the results of pedagogical observation made it possible to justify the pedagogical expediency of organizing ski races in physical education lessons as an effective means of increasing the level of physical activity of students with hearing impairments in general secondary education institutions.

Discussion. The results obtained indicate that the use of ski races in physical education lessons has significant pedagogical potential for increasing the physical activity of students with hearing impairments. The key aspect is not so much the type of physical activity itself as the specifics of its organization in the educational environment. A clear structure of classes, a step-by-step approach to learning, and reliance on visual channels of perception create conditions for active student involvement and reduce barriers to the perception of educational material (Zasenko & Kolupaieva, 2002).

The mechanism of the positive impact of ski racing on physical activity is probably related to the combination of the cyclical nature of the load and the possibility of individually adjusting the intensity. This approach allows students to work at their own pace, which reduces physical and emotional stress and at the same time contributes to the accumulation of sufficient physical activity during the lesson. An additional factor is the involvement of large muscle groups, which stimulates the development of general endurance and has a positive effect on the functional state of the body.

An important result is the establishment of the role of organizational conditions for ski racing in ensuring the effectiveness of training. The use of visual cues, clear demarcation of the training space, and regulation of movement along the distance contribute to increasing students' independence and reducing their dependence on verbal instructions. This is consistent with research in the field of adaptive physical education, which emphasizes the priority of visual-motor teaching methods for people with hearing impairments (Troianovska, 2025).

A comparison of the conclusions obtained with the data of other researchers confirms their consistency with the results of studies in which cyclic types of motor activity are considered an effective means of increasing motor activity and forming stable motivation for physical exercise in the context of inclusive education. At the same time, a distinctive feature of the study is its focus on the organization of ski races within the framework of physical education classes, which allows them to be considered not as an additional, but as an integrated component of the educational process.

From a practical point of view, the results of the study give grounds to recommend wider introduction of ski racing into the variable part of physical education programs for students with hearing impairments. It is advisable to develop methodological recommendations for teachers on organizing distances, dosing loads, and using visual means of controlling motor activity. This approach will contribute to increasing the effectiveness of lessons and creating a safe and accessible educational environment.

Based on the results of the study and our own practical experience, practical recommendations were developed aimed at improving the organization and content of the educational process (physical education/adaptive physical education classes) for students with hearing impairments.

Practical recommendations:

– *Integration of ski racing into the educational process.* It is recommended to include ski racing in the variable component of the physical education curriculum for students with hearing impairments as an effective means of increasing physical activity in the winter period.

– *Adaptation of physical education lessons.* During classes, it is advisable to ensure a clear lesson structure with step-by-step mastery of skiing techniques and a gradual increase in the volume and intensity of physical activity, taking into account the individual abilities of students.

– *Use of visual teaching aids.* It is recommended to use demonstrations of movements, signal gestures, instruction cards, and video materials to explain the teaching material, which contributes to a better understanding of the tasks by students with hearing impairments.

– *Ensuring safe conditions for classes.* The organization of ski races should include thorough preparation of the training site, monitoring of the technical condition of equipment, and compliance with safety rules, taking into account the peculiarities of signal perception by students with hearing impairments.

– *Differentiation of educational tasks.* It is advisable to use distances and exercise speeds of varying complexity, which allows students with different levels of physical fitness to be actively involved and promotes positive motivation.

– *Improving the professional competence of teachers.* It is recommended to organize methodological events and advanced training courses for physical education teachers on adaptive physical education and the specifics of working with students with hearing impairments.

– *Monitoring students' physical activity.* It is advisable to carry out systematic pedagogical observation of the level of physical activity and functional state of students in order to correct the content and organization of classes.

Prospects for further research are related to an in-depth study of the impact of ski racing on individual indicators of physical fitness and the psycho-emotional state of students with hearing impairments, as well as a comparative analysis of the effectiveness of various winter types of physical activity in general secondary education institutions. This will broaden scientific understanding of the possibilities of adaptive physical education and optimize physical education practices in an inclusive environment.

Conclusion. The study found that ski races are a pedagogically appropriate and effective means of increasing the physical activity of students with hearing impairments in general secondary education institutions. Their use in physical education lessons is consistent with the objectives of adaptive physical education and the principles of inclusive education, ensuring accessibility and variability of physical activity.

It has been proven that the effectiveness of ski racing is largely determined by the organization of the educational process. A clear lesson structure, step-by-step teaching of skiing techniques, the use of visual control tools, and the possibility of individual physical activity dosing create conditions for active student participation in educational activities and an increase in overall physical activity.

It has been established that the inclusion of ski racing in physical education lessons contributes to the formation of a positive attitude among students with hearing impairments towards physical exercise and increases their motivation to engage in regular physical activity. This allows us to consider ski racing not only as a means of physical development, but also as an important component of social adaptation in the educational environment.

The conclusions confirm the possibility of integrating ski racing into existing physical education curricula as a variable module without disrupting their logic and structure. This expands the methodological tools available to physical education teachers and contributes to improving the quality of physical education and health work with students with hearing impairments.

Thus, the goal set in the study has been achieved, and the conclusions formulated confirm the relevance and practical significance of using ski racing as a means of increasing the physical activity of students with hearing impairments in general secondary education institutions.

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PROBLEM-BASED TASKS AND ROLE-PLAYINGL GAMES IN FOREIGN LANGUAGE EDUCATION

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Abstract. This article examines the use of problem-based tasks and role-playing games as active learning methods in foreign language education within higher professional and military training institutions. Drawing on communicative and learner-centered approaches, the study focuses on the role of simulated professional and social situations in developing communicative competence, critical thinking, and learner autonomy. Problem-based tasks, including role-play and extensive extracurricular reading, are analyzed as tools that encourage meaningful language use rather than reproduction of ready-made patterns. Particular attention is paid to the staged organization of role-playing activities and the facilitating role of the teacher during communicative practice. The article also highlights the contribution of extensive reading to vocabulary development, analytical reading skills, and professional language awareness. The study concludes that the systematic integration of problem-based tasks and role-playing games enhances motivation, supports sustainable language competence development, and contributes to learners' professional and social readiness.

Key words: problem-based learning, role-playing games, foreign language education, communicative competence, professional training, active learning.

Introduction. The idea of making foreign language learning more active is not new to pedagogy. Currently, attempts are being made to implement this idea by introducing active methods into all types of learning processes (online, offline, blended learning). As Littlewood W. said much attention would be paid to problem-based tasks (role-playing games, additional reading) as tasks that form an active method in foreign language teaching (Littlewood, 1981: 8-10). With the help of these tasks, cadets do not receive knowledge in a ready-made form, but rather solve everyday or professional problems at the language level in pre-simulated learning situations.

In the context of globalization and increasing international cooperation, foreign language proficiency has become an essential component of professional, social, and institutional interaction. This tendency is particularly evident in fields that require a high level of responsibility, coordination, and intercultural communication, including military and other professional training systems. As a result, foreign language education is no longer viewed solely as a linguistic discipline but rather as a socially significant instrument for professional communication and decision-making.

A comparative analysis of traditional and active teaching methods is also employed. Traditional approaches are examined in terms of their focus on reproductive learning and controlled practice, while active methods are analyzed with regard to their emphasis on learner autonomy, interaction, and problem-solving in simulated social and professional situations. This comparison allows for the identification of methodological advantages of problem-based tasks and role-playing games in the development of communicative competence.

Among these methods, problem-based tasks and role-playing games have gained particular attention in foreign language pedagogy. These approaches are grounded in communicative and learner-centered theories, which view language as a tool for interaction rather than an object of study. By engaging learners in simulated situations that reflect real social and professional contexts, problem-based tasks encourage meaningful communication, critical thinking, and autonomous decision-making.

Role-playing games, in particular, allow learners to experiment with social roles, professional identities, and communicative strategies in a controlled yet flexible learning environment.

The relevance of role-playing and problem-based learning is especially pronounced in higher professional and military education, where future specialists must be prepared to operate in complex, unpredictable, and multilingual environments. In such contexts, language learning is closely connected with the development of professional competence, social responsibility, and readiness for interaction under time pressure and uncertainty. Simulated communicative situations enable learners to integrate linguistic knowledge with professional experience and cognitive skills, thereby increasing the practical value of foreign language education.

Another important component of active learning in foreign language teaching is extensive extracurricular reading combined with problem-based assignments. Reading professionally oriented texts not only contributes to vocabulary development and comprehension skills but also supports learners' ability to analyze information, identify key ideas, and interpret meaning in socially and professionally relevant contexts.

Despite the growing body of research on active learning methods, there remains a need for theoretical and methodological studies that systematize the principles, stages, and pedagogical functions of problem-based tasks and role-playing games within foreign language education. This is particularly important for interdisciplinary journals in the field of social sciences, where language learning is viewed as part of broader educational and social processes.

The aim of this article is to analyze the theoretical foundations and methodological potential of problem-based tasks and role-playing games in foreign language education, with special attention to their role in professional and social training. The study seeks to demonstrate how these methods contribute to the development of communicative competence, learner autonomy, and professional readiness, and to justify their relevance within contemporary educational practice

The active method requires cadets to both maximize their mental activity and mobilize the knowledge and experience they have previously gained while studying various disciplines throughout the educational process. At the same time, a positive effect is achieved through the comprehensive use of various teaching methods, including traditional ones. It is necessary to pay attention to the following statement: "The comprehensive use of various teaching methods will allow the teacher to make the best use of their strengths and capabilities and further eliminate the shortcomings of each method" (Littlewood, 1975: 3).

Working on various types of speech activity is a complex process that develops along with the development of speech activity training.

When working on teaching or developing speech skills in both foreign and native languages, exercises that require learners to solve speech-related problems have long been used. In foreign language teaching methodology, these methods primarily include role-playing, situational tasks, and reading additional non-educational texts, namely, so-called «extracurricular reading» [Nunan, 1991: 13).

Purpose and Objectives of the Study. The purpose of this study is to theoretically substantiate the pedagogical potential of active learning methods– specifically role-play and problem-based tasks – in foreign language instruction, and to determine their role in developing communicative competence in higher education learners.

We formulated the research objectives in accordance with the purpose:

– to analyze theoretical approaches to active learning in foreign language teaching presented in international pedagogical and linguistic studies;

– to compare traditional teacher-centered methods with student-centered active learning approaches in terms of their didactic effectiveness;

– to identify the methodological characteristics, functions, and instructional value of role-play as an active learning technique;

– to examine the educational potential of problem-based tasks in fostering learners' critical thinking, autonomy, and communicative skills;

– to generalize pedagogical experience described in scholarly literature concerning the integration of role-play and problem-based tasks into foreign language instruction.

The purpose and objectives of the study are interrelated and consistently reveal the research topic by focusing on the theoretical foundations and methodological relevance of active learning methods in language education.

Materials and Methods. The study is based on a qualitative theoretical analysis of scholarly sources devoted to foreign language teaching methodology, communicative language teaching, active learning, and learner-centered instruction. The research materials include monographs, peer-reviewed journal articles, and conference proceedings published by internationally recognized scholars.

The following research methods were employed:

– theoretical analysis of pedagogical, psychological, and linguistic literature to identify key concepts and approaches related to active learning;

– comparative analysis of traditional and active teaching methods to determine their advantages and limitations in foreign language education;

– systematization and generalization of pedagogical experience described in academic sources concerning the use of role-play and problem-based tasks in classroom and online learning environments.

The selected methods made it possible to comprehensively examine the research problem without recourse to empirical experimentation, which corresponds to the objectives of a theoretical and methodological study.

The research methods are based on a qualitative theoretical and methodological approach. The primary method applied in the study is a theoretical analysis of contemporary and classical scientific sources devoted to foreign language teaching, communicative language learning, problem-based instruction, and the use of role-playing activities in educational contexts. The analysis focuses on identifying key pedagogical principles, methodological frameworks, and conceptual models that explain the effectiveness of active learning methods in foreign language education.

A comparative analysis of traditional and active teaching methods is also employed. Traditional approaches are examined in terms of their focus on reproductive learning and controlled practice, while active methods are analyzed with regard to their emphasis on learner autonomy, interaction, and problem-solving in simulated social and professional situations. This comparison allows for the identification of methodological advantages of problem-based tasks and role-playing games in the development of communicative competence.

In addition, the study applies a method of pedagogical generalization, summarizing documented teaching practices related to the use of role-play and problem-based tasks in foreign language classrooms. The research does not include empirical data collection and is intended as a theoretical and methodological contribution to the field.

The resultes and its discution. Active methods of teaching a foreign language with problem-solving tasks lead to the most stable results in the formation of foreign language competence. For the learner, the assimilation of any material is more effective if they are able to solve the tasks set before them during conversation, i.e., verbally. Problem-solving tasks are performed in the process of solving specific language tasks. Such dual tasks bring learners closer to the processes of solving problems in the field of "exact" sciences in terms of their psychological essence. They are perceived by cadets/students of higher military educational institutions as an interesting process, similar to deductive reasoning on everyday or professional topics (Garnham, 1995: 97–101).

Cadets achieve the goals of foreign language classes using active methods, completing the tasks of the proposed assignment: discussing various everyday situations (travel, visiting a store, renting accommodation, etc.) or professional situations (defense, liberation of a designated territory, planning

such or similar actions). It can be explained by the fact that for cadets/students, i.e., future officers, «performing operations to solve various situational tasks is a familiar type of intellectual activity». In these training cases, but now in a foreign language, such «the elinguistic activity allows students to apply the knowledge, skills, and analytical abilities developed throughout the process of mastering professional skills» (Wilson, 1995: 35-59).

Working with professional texts based on scientific material serves as an example of presenting new language material in the form of a chain of tasks. Such material has thematic integrity, sufficient clarity of concepts, an international system of symbols and conventions, and logical professional organization. Regarding the semantic perception of comprehensible language, Stephen Krashen said the following: «We acquire language by understanding messages, i.e., by receiving comprehensible input that contains structures a little beyond the current competence» (Krashen, 1989: 23). In such texts, professional semantic connections are quite clear, which allows teachers and learners to immediately use the introduced material in meaningful statements.

Such texts contribute to the development of the learner's passive and active vocabulary. The work is carried out in several stages: – introduction of new lexical units, i.e., explanation of their meaning in a specific professionally oriented situation; – practice of new lexical units through educational exercises; – activation of new lexical units (NLU) in written or spoken language (Finocchiaro, 1969: 361-362). The first stage, i.e., the introduction of new lexical units into professional conceptual perception, can be combined with the simultaneous completion of various training problem-solving tasks by future officers. Logically, one of the first tasks at this stage is to explain the meaning of NLU in a foreign language. The next stage involves receptive tasks. Reading comprehension tasks prevail. Before preparing for situational tasks, cadets read texts, for example, with descriptions of training grounds, barracks, the daily routine in a military unit, details of classes in certain disciplines, and so on. Then, the cadets complete the tasks suggested for the texts. One of the stages of working with problem-solving tasks is a productive form of working with these same texts. Cadets compose a written text about a similar situation from their own lives, describing typical conditions, situations, details of events, reactions to events, and so on. Extensive reading is an effective way to build foreign language vocabulary, as it is an unconditional form of educational work with written texts. Extensive reading (ER) has been the subject of attention of Richard R. Day, Julia Bamford, and Paul Nation, who pointed out the criteria for selecting texts for extensive reading as a basis for motivation while learning a language. Richard R. Day pointed out: “Extensive reading involves reading large quantities of material for general understanding, enjoyment, and language development rather than for detailed analysis.” (Day, Bamford, 1998: 83).

Aitchison J. did the acent at the process of the extensive reading. It involves the implementation of several tasks through the completion of problem-based assignments (Aitchison, 1995: 81–89). Extensive reading takes place in several stages and always requires assistance in understanding the tasks or checking the quality of the assignments completed by the students.

The first stage of working with out-of-class texts involves completely independent work, namely reading the text, familiarizing oneself with the NLE and working with them, followed by completing the tasks that follow the texts – all of which is done independently by the students.

The next stage of working with extracurricular texts involves completing tasks to demonstrate what has already been read. Among other tasks, it is worth noting the tasks aimed at developing cadets' skills in forming oral messages in a foreign language on a topic related to the previously read text. Such productive forms of assignments (preparation of reports, presentations, retellings) make reading at home a motivated task in itself.

Problem-solving assignments, aimed at activating the learning process, require the ability to read texts in a foreign language, i.e., to understand and analyze the meaning of what has been read. Analytical reading enriches the cadets' foreign language vocabulary. «Completing assignments

in the process of extracurricular reading requires cadets to identify and remember the most important points of the text they have read» (Nation, 2001: 45). Such identification and memorization is necessary for cadets to select the linguistic means of expressing the meaning of their speech.

The intensification of foreign language learning also occurs when performing problem-based tasks based on the text. Such tasks include the ability of cadets to divide the text into meaningful parts, divide the learning situation into meaningful parts, ask preparatory questions, and compile learning tasks. Each of the tasks is focused on working in groups in the classroom. Mary Finocchiaro said about the task of demonstrating the text read which can involves the introduction of necessary visualizations: symbols, terms, diagrams, and drawings related to the texts. Mary Finocchiaro underlines that the ability to present thematic material involves solving difficult communicative tasks (Finocchiaro, 1969: 372-373).

The introduction of role-playing into the methodology of activating foreign language learning came with the introduction and expansion of the role of communication as a result of global foreign language acquisition. The introduction of role-playing as one of the tasks of the active method in foreign language teaching is facilitated by the definition given by Chr. C. Bonwell and J. A. Eison: "Active learning engages students in doing things and thinking about the things they are doing." The activation of foreign language teaching is based on discussion, project work, reading, and research (Bonwell, 1991: 2).

As a result, the principle of developing communication skills with its methodological means of formation has become one of the most essential in the methodology of language teaching, especially foreign languages. Chr. Bonwell, J. Eison, Mer. Swain, V. Littlewood, N. Nunan, T. Krpenko, K. Wendelin, and many other methodologists and educators recognize the great importance of role-playing for the development of communication skills in their works.

Role-playing is defined by the authors as a situation of spontaneous behavior of the student, his reaction to the behavior of interlocutors or people present in a simulated situation. V. Littlewood, in his work Communicative Language Teaching: An Introduction, as well as in other publications, defines play as a technique in which learners must freely improvise within a given situation, acting as one of the participants in the game. N. Nunen, in his work Language Teaching Methodology, notes that an essential element of role-playing is the exclusively communicative resolution of a given problem situation. In turn, speech "sharpens" the motivation of cadets to express themselves in a foreign language.

Ukrainian and international authors on this topic emphasize that role-playing provides optimal stimulation of students' communicative activity in foreign language classes. The need to find a solution to a given problem makes communication between participants in a given situation more natural. Arifah Mardiningrum and his co-authors (2016) concluded that presenting students with problems in the proposed educational game and the need to solve them also serve to develop critical thinking in students. The observation made in this work applies to educational institutions of any level (higher and secondary educational institutions) and regardless of their professional orientation (Mardiningrum, 2016: 15–16).

Theoretical and methodological works on the use of the "role-playing" technique in classes aimed at developing foreign language competence point to a number of linguistic and psychological tasks that it solves. Arifah Mardiningrum said about the essential component of role-playing as it is holistic influence on the development of future professionals. Role-playing is conducted in two stages: familiarization and implementation. Mardiningrum A. showed that each stage solves its own tasks. In general, not only is the foreign language competence of the student developed, but also their personal professional qualities (Mardiningrum, 2016: 18–19).

One of the basic tasks is to focus on developing the cadet's independence, i.e., their ability to independently and thoroughly consider the proposed situation. The cadet's overall assessment of the situation includes several stages: independent analysis of the situation; thinking through the stages

and methods of independently solving all the proposed problems; thinking through the stages and methods of solving linguistic tasks, i.e., determining the linguistic methods for solving the identified problems; attempting to complete the assigned linguistic tasks independently. The implementation of all these stages leads to cadets' understanding of their independent responsibility even in a foreign language class, participating in an educational role-play. D. Widiasri & D. Ay. K. Dwi Payanti – contemporary publications (2024) on role-play in second language teaching and the use of active methods, including practical examples and SLA theories.

In practice, this looks as follows: during a practical foreign language class, cadets are asked to familiarize themselves with the situation and role-play assignment. After reading all the conditions independently, cadets are given time to think about the proposed situation. During this time, the cadet must not only understand the meaning of what they have read, but also think about and decide how and what they can say in a foreign language. The cadet determines all the components of their foreign language level. Knowledge: grammar, vocabulary, stylistics, and even the ability to form the phonetic color of their speech. At this stage– the stage of analyzing independent capabilities– the teacher certainly does not give much time.

Independent and thorough analysis at the previous stage often leads the student to conclude that they need help in understanding what they have read, and possibly in composing sentences and statements in order to participate in communication. The student can seek help from classmates or online resources. This stage is focused on independence.

The next stage involves both independent and group work. This stage takes the form of communication. Working in groups or independently, students look for the only correct solution to the proposed game situation from the point of view of the game participant. In practice, this looks like this: if a cadet does not understand something in the conditions, they ask clarifying questions to the other participants, that is, a dialogue begins. An essential condition of this stage is the use of only a foreign language, i.e., foreign language competence is formed already at the stage of preparation for the role-playing game.

Littlewood defined a number of basic rules for role-playing. First, «the learner is asked to put themselves in a situation that may arise in real life: from a simple one, such as meeting an acquaintance on the street, to a much more complex one»», such as business negotiations, conferences, and so on». Second, they are asked to «adapt to a specific role in a similar situation». In some cases, the learner can play the role of themselves, while in others they will have to take on an imaginary role. Thirdly, it is necessary to «behave as if everything were happening in real life» (Littlewood, 1975: 3). The behavior of the game participants should correspond to the role they are playing. Fourthly, game participants should focus their attention on the communicative use of language units, rather than on the usual practice of reinforcing them in speech.

Methodologists have identified five types of roles: 1) «innate» roles, which determine the gender and age of the participant in the game; 2) «assigned» roles, which determine nationality or membership in a social group; 3) «acquired» roles, which determine profession; 4) «effective», which determine the range of actions in a life situation, for example, during a visit to the doctor or an exhibition, workplace, or other similar situations. All of the above four types of roles differ from the last one. The fifth type of role does not assume the permanence of events, that is, the situation in which the role-playing participant may find themselves is temporary. That is why the fifth type of role is «functional» that is, it determines functional communication, such as offering help, expressing regret, emotional expression, and the like (Littlewood, 1975: 19–21). The most important types of roles in teaching foreign language communication are the 4th and 5th types. “Functional” roles are considered to be the minimum blocks on which role-playing is based. They occur in various situations and therefore need to be carefully worked out at the preparatory stage.

In real teaching life it looks like three main stages in role-playing: preparatory, the role-play itself, and the final stage. Gray M.A. showed that a more detailed division of stages is also proposed. Gray M.A. did the five stages: 1) preparatory stage in the classroom; 2) preparatory stage at home/in the process of personal studing or preparation (sampo); 3) role-playing game; 4) final stage at home/in the process of sampo; 5) final stage in the classroom (Gray, 1987: 5-6). At the same time Wendelin K.H. holding such division said that that the preparatory stage in the classroom includes some more: a) an introductory talk by the teacher, who introduces the role-playing situation or questions for discussion of issues; b) familiarization of students with the linguistic content of the game; c) preliminary practice of lexical units and grammatical structures (Wendelin, 1991: 182).

In turn, preparation outside the classroom, i.e., self-study, includes: a) reading texts and reference materials on the selected topic; b) gathering information on a specific situation that is unfamiliar.

After conducting the training role-play itself, the final stage is a necessary element of the lesson. At the final stage, depending on the time available, the teacher conducts: a) discussions on the given topic or a related topic; b) written assignments on the topic: writing an essay, a newspaper article, letters to a friend, etc.); c) discussion of the role-playing game with independent evaluation by the students of the game played; students note what was interesting or not, what was done or said correctly or incorrectly; d) the teacher gives grades for the communicative activity of each participant.

The simplest type of role-playing game is playing in pairs. Usually, role-playing games in pairs are aimed at practicing certain lexical units and grammatical structures and depend on the purpose of the lesson and the level of training. In such cases, the time for the game should be limited.

Role-playing games can be conducted in subgroups and with a large number of people. During the lesson, either the entire group of students or several people can participate in the game. If the teacher plans to have several groups working at the same time, the whole group is divided into subgroups. The students are given tasks and begin to work. The teacher monitors the correctness of the participants' speech, moving from one group to another.

Role-playing in a “chain” sequence is no less productive. Subgroups can play in turn. The sequential form of work is particularly constructive in mutual control. While one subgroup is playing, the others observe and evaluate its work in order to participate in the subsequent discussion of the speech they have heard, the correctness of the messages, and the statements of the participants in the game of a particular group. Working in subgroups can be the first step towards role-playing at a higher level, during which all participants act out discussions, meetings, symposiums, conferences, sessions, etc. on professional topics.

It should be noted that “the particular sensitivity of the game to the sphere of human activity and relationships between people shows that, despite the diversity of plots, they all have the same content – human activity and relationships between people in society” (Jones, 1982: 13).

Farris, Pamela.J. noted that while children usually immerse themselves in play with ease, many adolescents and adults are reluctant to participate because they are afraid of appearing ridiculous to their group partners (Farris, 1993: 17). In foreign language classes, role-playing, as already mentioned, plays a role in the development of foreign language knowledge and skills. Language support, namely key words and phrases provided by the teacher before the lesson, helps students master the topic under discussion.

However, when preparing cadets for role-playing, it is very important to focus their attention not only on foreign language skills, which is the main goal, but also to develop their public speaking skills, i.e., to contribute to their psychological development. The tasks completed at the very beginning of the lesson: answering thematic questions, reading words and phrases, describing thematic pictures, diagrams, and tables also become a psychological support for cadets when speaking in front of their colleagues and teacher. For many students, transforming into a role greatly contributes to communication management. The situations created by the teacher are organized as an intertwin-

ing of role expectations and informal personal manifestations. Depending on their personality traits, their level of foreign language proficiency, and their specific role in the learning situation, cadets can "express themselves" or "hide" behind their role.

Active teaching methods require a high level of professionalism from the teacher, which is manifested in knowledge of both the foreign language and the subjects used in the role play. It is important for the teacher to know the psychological characteristics of the group members. When preparing the material, plan, and tasks that stimulate foreign language learning, the teacher must also think through how they will be conducted. The following pattern of teacher behavior is preferable: at the preparatory stage of the game, the teacher exercises maximum control over the cadets' work. They develop schemes for conducting conversations, modeling situations, selecting and practicing the necessary language tools. At the second stage – the actual conduct of the game – the teacher's control should be minimal and unobtrusive.

During the game, the teacher observes the participants, notes mistakes, but does not interrupt the game to correct them. The fear of making a mistake only inhibits the cadets' speech and contradicts the very idea of natural communication. Therefore, correcting mistakes during role-playing is not allowed, which requires appropriate mental preparation from the teacher. Only after the game is over is its course analyzed, successful moments are noted, and then the teacher focuses on the most typical mistakes made by the participants. The teacher recommends and organizes further work to correct mistakes or inaccuracies. Correcting mistakes, however, contributes to the formation of foreign language competence and communication in a foreign language. It is precisely the factor of parallel study of a foreign language and abstract topics in the language that often causes difficulties for cadets. The teacher provides the necessary hints on his part, subject to the principle of foreign language communication, noting the linguistic form of the content of speech. In such cases, props prepared for this purpose in the form of relevant aids (reference books, diagrams, maps, invitations, announcements, etc.) provide invaluable assistance.

In the field of foreign language teaching in Ukraine, experience has already been gained in the use of educational games. The Kiev Technological Institute of Light Industry, Dnipro National University named after O. Gonchar, Kharkiv National Pedagogical University named after G. S. Skovoroda, and South Ukrainian University named after K. D. Ushinsky have developed educational games in foreign languages for all specialties offered by these universities.

The games follow in order of increasing complexity, with each subsequent game using the speech material practiced in the previous game. Each game includes several situations. For example: 1) meeting at the airport and conversation on the way to the city, for example Kiev; 2) meeting at the institute's youth committee; 3) meeting at the student scientific society; 4) excursion around Odessa; 5) evening of leisure at the institute's international club. The game provides situations for students with roles of people from Ukraine and from different countries. In accordance with a pre-developed conversation plan for each situation, the teacher gives a specific task to each participant. However, it is impossible to completely simulate the situation and predict the entire course of the game, since excessive regulation of communication, as well as the limited language skills of the students, can "distroy" the game. Skillful intervention by the teacher helps to remedy the situation and give the conversation a natural feel.

Conclusions:

– Problem-based tasks and role-playing games function as effective active learning tools that shift foreign language education from reproductive to communicative and problem-oriented practice.

– Role-playing activities model socially and professionally relevant situations, enabling learners to develop communicative competence, critical thinking, and decision-making skills.

– Extensive reading combined with problem-based assignments supports vocabulary acquisition, analytical reading, and professional language awareness.

– The teacher's role as a facilitator rather than a controller is essential for creating conditions of natural communication.

– The systematic integration of problem-based tasks and role-play contributes to learners' professional and social readiness, which is especially important in higher professional and military education.

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THE MISSION COMMAND CONCEPT IN MILITARY COMMAND AND CONTROL AND MILITARY EDUCATION: A SCIENTIFIC REVIEW

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Abstract. The article provides a scientific review of the Mission Command concept as a contemporary model of military command and control and as a methodological reference point for the development of military education. Ukrainian and international scholarly publications and doctrinal sources are analysed, covering the evolution of Mission Command, its relationship with the Auftragstaktik approach, manoeuvre concepts, and NATO standards.

It is shown that domestic research predominantly addresses the concept within the framework of doctrinal and managerial approaches, whereas international discourse closely links Mission Command to the system of professional military education (PME). The pedagogical potential of Mission Command is substantiated as a framework for training a new type of officer, with an emphasis on autonomy, disciplined initiative, responsibility, and learning under conditions of uncertainty. Educational technologies relevant to this concept are identified.

Key words: Mission Command, military education, training of future officers, autonomy, disciplined initiative, competency-based approach, NATO standards.

Introduction. The full-scale war in Ukraine has significantly intensified the need to rethink approaches to military command and control and the training of officer personnel. The contemporary operational environment is characterised by high dynamics, information overload, fragmented data, rapidly changing situations, and persistent uncertainty regarding the course of events. Under such conditions, traditional directive command models, based on detailed regulation of subordinates' actions and rigid vertical control, gradually lose their effectiveness. Instead, approaches that ensure flexibility, responsiveness, and initiative at the unit level are gaining importance, as well as commanders' ability to make decisions under time pressure and incomplete information.

One of the concepts that has become central in the military thinking of NATO countries and is increasingly integrated into contemporary military discourse is Mission Command. Within this concept, achieving objectives relies not on detailed control over the execution process, but on clearly articulating the mission and the commander's intent, delegating authority to lower echelons, and developing subordinates' disciplined initiative. Mission Command is grounded in the assumption that effective action in a complex operational environment is possible only within a command culture characterised by mutual trust, responsibility, and the autonomy of servicemembers.

At the same time, Mission Command is not only a command and control tool but also an important reference point for the modernisation of military education, as its effective implementation directly depends on the level of professional preparedness of the officer corps. In international discourse, the Mission Command concept is considered inseparable from professional military education, where military educational institutions perform the function of shaping a new type of officer—capable of professional judgement, critical thinking, autonomous decision-making, and responsible conduct under conditions of uncertainty. Thus, the key issue is not merely the adaptation of organisational command procedures but also the renewal of pedagogical approaches, educational environments, and learning technologies that must reflect the logic of Mission Command.

This issue is of particular importance in the Ukrainian context, where the security and defence sector is undergoing transformation toward Euro-Atlantic integration, and the need is increasingly recognised for systematic officer training capable of effective performance in modern wartime conditions. In this regard, the pedagogical interpretation of Mission Command as a framework influencing the content and objectives of professional training, competency development, the organisation of the educational process, and the criteria for assessing learning outcomes becomes especially relevant. It is also important to note the перспективність (promise) of considering Mission Command in the training of officers with a гуманітарне спрямування (humanitarian orientation), who support moral and psychological resilience, trust, and cohesion within units – factors critical to the effectiveness of decentralised command.

Therefore, the relevance of this study is determined by the need for a comprehensive understanding of Mission Command as a multidimensional concept combining managerial and pedagogical potential and serving as a methodological reference point for the development of contemporary military education.

The aim of the article is to conduct a scientific and theoretical analysis of the Mission Command concept in military command and control and to determine its role and place within the system of military education as a methodological reference point for training a new type of officer capable of autonomous decision-making, disciplined initiative, and responsible professional activity under conditions of uncertainty.

To achieve this aim, the following **objectives were formulated**:

1. To analyse scholarly and doctrinal approaches to understanding the Mission Command concept in contemporary military theory and practice.

2. To outline and compare the features of Mission Command interpretation in domestic and foreign sources, particularly in the context of Auftragstaktik, the manoeuvre approach, NATO standards, and professional military education (PME).

3. To substantiate the pedagogical potential of Mission Command as a methodological framework for modernising military education and shaping the target model of officer training (autonomy, responsibility, disciplined initiative, and decision-making under conditions of uncertainty).

4. To identify educational technologies most relevant to the logic of Mission Command and to outline prospects for its integration into the training of future officers, including those with a humanitarian orientation.

The study was conducted as a scientific review using a set of general scientific **methods** of theoretical analysis. The following methods were applied:

• analysis, synthesis, and generalisation – to systematise scientific approaches to Mission Command and to identify its managerial and pedagogical dimensions;

• comparative analysis – to compare domestic and international perspectives on the Mission Command concept and its integration into professional military education;

• structural and logical method – to construct a holistic understanding of Mission Command's place in the military education system and to determine its functions at the value-cultural, competency-based, and technological levels;

• content analysis of scholarly publications and doctrinal documents (including ADP 6-0, AJP-01) – to identify key categories, principles, and educational implications of Mission Command.

Analysis of Research and Publications. In contemporary military science, the concept of Mission Command is considered one of the key models of command and control under conditions of high operational tempo, informational uncertainty, and the need for rapid adaptive decision-making. The increasing complexity of the operational environment and the reduction of time available for decision-making necessitate a shift from directive command toward decentralised approaches grounded in subordinates' initiative, orientation to the commander's intent, and mutual trust. In this

context, Mission Command gains relevance not only as a doctrinal philosophy of command, but also as a methodological guideline for the development of the modern system of military education and officer training.

In Ukrainian scholarly sources, the issue of decentralised command is most often examined through the historical and conceptual origins of Mission Command, in particular through the notion of Auftragstaktik ("mission-type tactics"), which in the military-theoretical tradition is regarded as the foundation of contemporary mission-oriented command models. In this regard, the study by V. S. Korendovych (Korendovych, 2020) is significant: it analyses the German experience of Auftragstaktik and emphasises its importance for enhancing command effectiveness under conditions of modern (including hybrid) warfare. The author demonstrates that decentralisation of command and delegation of authority to lower levels can substantially increase unit adaptability, responsiveness, and mission effectiveness, provided that personnel are appropriately trained and a trust-based command culture is established.

Another important research direction involves examining Mission Command within the framework of the manoeuvrist approach and the application of NATO standards in operational planning and conduct. In Ukrainian scholarship, this aspect has gained particular importance due to the ongoing transformation of the Armed Forces of Ukraine in line with Euro-Atlantic standards. For instance, the joint work by I. Rolin, D. Kupriienko, and V. Marushchak (Rolin, 2022), devoted to the conceptual approach to planning and conducting land operations according to NATO standards, states that Mission Command principles constitute one of the basic foundations of the manoeuvrist approach, which orients command toward achieving results and ensuring flexibility, asymmetry, and speed of action. Within this logic, Mission Command emerges as a concept that ensures effective command through mission definition and articulation of intent rather than through rigid regulation of subordinates' actions.

At the same time, contemporary Ukrainian academic discourse also features attempts to systematise Mission Command principles as a concept of command focused on achieving the end state. In particular, the article by Yu. Repilo, V. Rossiitsev, and O. Ishchenko (Repilo, 2022), devoted to the analysis of core principles and concepts of doctrinal support in the armed forces of leading countries, considers Mission Command within the system of modern doctrinal approaches. The authors emphasise that Mission Command requires subordinates to focus on the outcome (desired end state) rather than on detailed prescriptions regarding task execution, which is critically important for command under uncertainty. The study also highlights the value of a concise, standardised form of mission articulation (mission statement) as a mechanism for communicating the commander's intent.

A separate group of sources includes publications in which Mission Command is described as a broader philosophy of command and is linked to the human factor and behavioural patterns of commanders and subordinates in the operational environment. A representative example is the publication by I. Rolin, D. Kupriienko, O. Serpukhov, and V. Marushchak (Rolin, 2025), where Mission Command is defined as a philosophy of directing military operations based on the consideration of the human factor, autonomy, initiative, and responsibility. The authors stress that the effectiveness of Mission Command depends not only on formal structural decentralisation but also on the development of a command culture and on commanders' ability to formulate clear intent and ensure shared understanding within the unit.

However, the analysis of domestic publications indicates that in most works Mission Command is examined primarily within the domain of military command and control, operational planning, and doctrinal support, whereas the military-educational aspect of this concept is presented less systematically in the literature. Available sources allow the conclusion that the full implementation of Mission Command requires not only organisational modernisation of the command system but also changes in officer training aimed at developing competencies related to autonomous decision-making, critical thinking, disciplined initiative, and responsibility for outcomes. Accordingly, the mechanisms for

integrating Mission Command principles into the military education system require further scholarly analysis – particularly with regard to the training of cadets and officers in humanitarian specialisations, who ensure the moral and psychological component of combat readiness and play an important role in sustaining trust and cohesion within units.

Thus, the review of scholarly sources makes it possible to state that Ukrainian military-scientific literature contains theoretical and doctrinal approaches to decentralised command and Mission Command; however, there remains a need for a more systematic understanding of the concept as an interdisciplinary framework combining managerial, psychological, and educational dimensions. This determines the relevance of further research on Mission Command in the context of military education development and professional officer training in the conditions of contemporary warfare.

In foreign military-scientific and military-educational discourse, Mission Command is regarded not only as a principle of command and control but also as a fundamental framework for shaping officers' professional competencies within the system of professional military education (PME). In works by American, NATO, and European authors, Mission Command is positioned as a response to the challenges of the modern operational environment: high operational tempo, uncertainty, information overload, dispersed forces, and reduced time for decision-making. Accordingly, implementing Mission Command requires training officers capable of acting autonomously, deliberately, and responsibly, while maintaining coherence of action through understanding the commander's intent.

In US and NATO doctrinal documents, Mission Command is defined as a philosophy of command based on decentralised decision-making and orientation toward goal achievement rather than process control. Importantly, alongside procedural aspects, these sources emphasise psychological and cultural conditions of effectiveness: mutual trust, shared understanding, the development of initiative, and willingness to accept prudent risk. This approach establishes a pedagogical logic: Mission Command can function only when a specific professional culture and personnel readiness are deliberately developed through a targeted system of education and training (ADP 6-0, 2019; AJP-01, 2022).

Within the context of military education, foreign authors emphasise that Mission Command cannot be "implemented by order." This concept requires the transformation of the educational environment, since officer competence within Mission Command is grounded in the development of thinking, autonomy, and responsibility. In particular, N. Murray (Murray, 2014), writing in *Joint Force Quarterly*, argues that the effectiveness of Mission Command is directly associated with the quality of PME, which should cultivate officers' ability to act in complex situations, interpret the commander's intent, and make decisions under conditions of incomplete information. The author stresses that military education must go beyond the transfer of knowledge and standard procedures by fostering strategic thinking, professional judgement, and readiness for independent leadership.

Publications focused on the pedagogical implementation of Mission Command are also illustrative. In the article "Mission Command in Education" (Mission Command in Education, 2016), the Mission Command concept is directly translated into the domain of learning and officer preparation. It is emphasised that instructors and faculty should reproduce conditions in the educational process that cultivate cadets' disciplined initiative and autonomy. Within this approach, the learning process is conceptualised as an environment where cadets learn to act under uncertainty through decision-making practice, analysis of mistakes, and reflection rather than through reproducing a single correct algorithm. Thus, Mission Command is pedagogically transformed into a learning model that shapes not merely skills but, above all, an officer mindset (Army University Press, 2016).

An important theoretical foundation of contemporary interpretations of Mission Command in international literature is the historical concept of Auftragstaktik, understood as a form of "intent-based command" that provides subordinates with freedom of action within the boundaries of the assigned purpose. In studies on the history of military thought, Auftragstaktik is viewed as a cultural and educational system in which officers must be able to act independently and responsibly.

This highlights a pedagogically crucial aspect: the effectiveness of Mission Command cannot be achieved without an appropriate educational foundation that fosters intellectual autonomy, adaptability, and internal discipline.

In modern interdisciplinary research, Mission Command is also examined through a psychological and pedagogical lens, particularly through the concepts of autonomy and intrinsic motivation. For example, in studies grounded in self-determination theory, Mission Command is interpreted as an autonomy-supportive leadership model that facilitates the satisfaction of service members' basic psychological needs (autonomy, competence, and relatedness), which positively affects engagement, effectiveness, and psychological resilience (Knevelsrud, 2023).

A distinct body of foreign publications addresses educational technologies most consistent with the logic of Mission Command. Contemporary PME approaches devote considerable attention to case-based learning**,** scenario-based training**,** tactical decision games, and the After Action Review (AAR) system as a core mechanism of professional learning through reflective analysis of actions. These tools aim to develop critical thinking, situational awareness, and decision-making under uncertainty – competencies central to the officer profile within the Mission Command paradigm. A defining feature of such approaches is the shift of emphasis from "correct" execution of an algorithm to the soundness of decisions and the ability to act in accordance with the commander's intent.

Thus, international literature presents Mission Command as a comprehensive concept combining managerial, cultural, and educational dimensions, in contrast to part of the domestic scholarship where Mission Command is mainly addressed from doctrinal and organisational perspectives. International studies clearly emphasise PME as a key condition for Mission Command implementation. This makes it possible to interpret Mission Command as a pedagogical model of officer training that entails cultivating autonomy, responsibility, disciplined initiative, the capacity for analysis and self-correction, and readiness to act under uncertainty – competencies critical to the contemporary officer corps.

In the context of modernising military education and adapting officer training to contemporary requirements, not only the formation of professional competencies but also the development of value-meaning and personal characteristics of the future officer becomes particularly significant. In particular, in our previous publication we substantiated that cadets' professional identity constitutes a key pedagogical factor of readiness to perform service and combat tasks under the complex conditions of war and uncertainty, as it integrates motivation, value orientations, internal responsibility, and awareness of the officer's role as a bearer of a professional mission (Yurkov, 2025).

From this perspective, Mission Command can be viewed as a promising managerial and educational framework that requires service members not only to demonstrate исполнительная дисциплина (executive discipline) but also autonomy, disciplined initiative, and mature responsibility – qualities that directly rely on a well-formed professional identity of the future officer.

Results and Discussion

Mission Command in the Military Education Process: Role, Place, and Pedagogical Implications

Within the context of professional military education (PME), the Mission Command concept should be regarded not only as a doctrinal model of military command and control, but also as a pedagogical framework for preparing an officer capable of operating under conditions of uncertainty and high operational tempo. This implies that Mission Command establishes requirements not so much for a particular subject or training module as for the target graduate profile, the educational environment, teaching and learning methods, and the logic of assessing training outcomes.

Mission Command substantially transforms the traditional didactic paradigm of military education. While the classical (directive) model predominantly focuses on precise adherence to instructions, compliance with algorithms, and reproduction of formally standardised procedures, the Mission Command paradigm requires military education to develop the future officer's ability to make inde-

pendent decisions while maintaining coherence with the commander's intent and the overall operational purpose. Accordingly, the central educational task becomes the preparation not of a mere "executor of orders," but of an agent of officer professionalism characterised by disciplined initiative, adaptability, responsibility, and professional judgement.

The role and place of Mission Command in military education can be analysed at three interrelated levels: the value-cultural**,** competency-based, and technological levels.

1. Mission Command as a Value-Cultural Regulator of the Educational Environment

Mission Command assumes that an officer executes tasks not only within the boundaries of formal discipline but also within a space of mutual trust, where initiative is supported and responsibility for decisions is recognised as a prerequisite for effectiveness. This directly affects the educational environment: a military educational institution must fulfil the function of cultivating a culture of responsibility and trust, within which cadets learn to act under supervision—but not under micromanagement.

Within such an educational culture, the following become particularly important:

fostering professional autonomy as an internal readiness for independent action;

forming an orientation toward responsibility for outcomes, rather than for the "correctness of procedure";

maintaining the psychological safety of learning, where error is treated as a resource for analysis and learning rather than solely as a disciplinary failure.

Thus, within PME, Mission Command functions as a mechanism of cadets' pedagogical socialisation into officer culture – one in which trust, results-orientation, and readiness to make decisions under time pressure are central.

2. Mission Command as a Competency Model for Officer Training

In educational terms, Mission Command defines a set of competencies that are critically important for officer performance in modern warfare. These include:

- the ability to interpret the commander's intent and translate it into concrete actions;
- decision-making under uncertainty;
- critical thinking and the ability to reassess changing situations;
- situational awareness as a basis for adaptive behaviour;
- disciplined initiative as a synthesis of autonomy and adherence to norms;
- responsibility and self-regulation as foundations of professional maturity.

Given this, Mission Command should be integrated into military education not as an isolated topic, but as a cross-cutting principle embedded across academic disciplines, field training, command-post exercises, and assessment systems.

Mission Command as Didactic Logic and Educational Technologies

Mission Command requires educational technologies that reproduce the real nature of military command: high dynamics, incomplete information, competing objectives, time pressure, and the need for initiative-driven action. For this reason, international PME practice prioritises active learning methods, among which the following are most consistent with the Mission Command logic:

- scenario-based learning;
- case-based learning;
- tactical decision games;
- wargaming;

After Action Review (AAR) as a foundational mechanism of learning from experience.

The application of these approaches makes it possible to develop in cadets not only technical and tactical knowledge, but also the capacity for cognitive reconstruction of the situation, forecasting, decision justification, risk assessment, and reflective evaluation of consequences.

AAR is of special pedagogical significance because it supports a shift from "error detection" to decision analysis, thus cultivating a culture of open professional debriefing—an essential precondition for Mission Command as a command culture.

3. Mission Command as a Criterion for Assessing Officer Training Outcomes

In traditional systems of military training evaluation, assessment often focuses on compliance with standards and procedures. However, within the Mission Command logic, officer effectiveness is determined by the ability to:

- maintain alignment of actions with the commander's intent;
- act autonomously without losing operational coherence;
- adapt to changes in the situation;
- make decisions under pressure;
- sustain the unit's combat capability and controllability.

Therefore, Mission Command requires a recalibration of assessment priorities – from procedural correctness to the soundness of decisions, flexibility, and responsibility. This should be taken into account across different stages of cadet education, particularly during practical training and field exercises.

Mission Command in the Training of Future Humanitarian-Oriented Officers

A separate and promising direction concerns the role of Mission Command in the training of humanitarian-profile officers, whose professional activity is directly linked to sustaining the unit's moral and psychological condition, levels of trust, and cohesion. These factors – trust, cohesion, disciplined initiative – are critical for Mission Command functioning. Accordingly, humanitarian specialists can be viewed as agents who maintain the "psychological infrastructure" of Mission Command by supporting a command culture of trust, resilience, and responsibility within military collectives.

Thus, within military education Mission Command should be conceptualised as a comprehensive framework shaping an educational model of training a new type of officer: autonomous, competent, capable of acting under uncertainty, and characterised by high levels of responsibility and professional judgement.

Conclusions. The analysis of domestic and international research has demonstrated that the Mission Command concept is currently regarded in military science as one of the key models of command and control under conditions of high operational tempo, information uncertainty, and the need for rapid decision-making. Its core lies in a transition from directive command to a decentralised model based on orientation toward the commander's intent, disciplined initiative, and mutual trust.

The review of Ukrainian scholarly sources indicates that the issue of Mission Command is most frequently examined through the prism of the historical origins of Auftragstaktik, as well as within the manoeuvrist approach and the adaptation of operational planning to NATO standards. At the same time, in most domestic publications Mission Command is interpreted primarily as a doctrinal and managerial phenomenon, whereas its educational and pedagogical potential is presented in a less systematic manner. This underscores the relevance of further scholarly reflection on Mission Command as an interdisciplinary framework integrating managerial, psychological, and pedagogical dimensions.

The analysis of foreign publications has shown that in international discourse Mission Command is directly associated with the system of professional military education (PME) and is considered a fundamental basis for developing officers' professional competencies. International authors emphasise that Mission Command cannot be implemented solely through normative or administrative measures, since the effectiveness of this concept is determined by the level of personnel preparedness and by the maturity of a professional culture grounded in trust, autonomy, and responsibility.

Based on the conducted review, it has been established that Mission Command possesses a clearly articulated pedagogical significance, as it provides:

1) a target model of officer training (an autonomous, adaptive officer capable of operating under conditions of uncertainty);

2) competency-based guidelines for military education (decision-making, interpretation of intent, critical thinking, disciplined initiative);

3) the need to transform the educational environment toward a culture of responsibility and the psychological safety of learning;

4) a priority of active educational technologies (scenario-based learning, case method, tactical decision games, wargaming, After Action Review) that facilitate the development of professional judgement and reflective decision analysis.

Special attention is given to the перспективність (promise) of applying Mission Command as a pedagogical framework in the training of humanitarian-profile officers, whose professional activity is directly associated with sustaining moral and psychological readiness, cohesion, and trust within units. In this context, humanitarian specialists may be viewed as a key factor in ensuring the "psychological infrastructure" of Mission Command in military collectives.

Thus, Mission Command can be defined as an important methodological guideline for military education reform aimed at developing a new type of officer – capable of acting autonomously and responsibly under the conditions of modern warfare. Promising directions for further research include: developing a pedagogical model for integrating Mission Command into cadet training programmes; identifying criteria and indicators of Mission Command-related competency development; and empirically assessing the effectiveness of educational technologies oriented toward fostering disciplined initiative, trust, and professional judgement.

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THEORY AND HISTORY OF CULTURE & PHILOSOPHY

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CULTURAL IDENTITY IN CONTEMPORARY PHOTOGRAPHY: TRANSFORMATION OF VISUAL CODES IN A GLOBALIZED WORLD

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Abstract. The article discusses how photography can be used to build, maintain and alter cultural identity in an era of globalization. The paper seeks to understand how photography influences cultural identity and visual techniques that will make the local images globally acceptable and to create a classification of cultural codes in the modern photography. The research method involves the use of semiotic analysis of the images in photographs, phenomenological study of visual perception and evaluation of the works of photographers of different cultures. The paper draws on such instances of documentary and art photography as the works of indigenous photographers who take back visual stories that were previously under colonial control and how digital technology alters the way of movement of cultural symbols. The results indicate that photography acts as both a means of maintaining a culture and a means of changing identity. Visual symbols combine local traditions with international visual language to create new cultural expressions. The study identifies three main cultural code types used in modern photography which are archived memorial and performative-ritual and dialogical-transcultural. Globalization makes photography more than a recording tool because it transforms photos into cultural identity builders who use their space to connect local elements with worldwide influences.

Key words: cultural identity, photography, globalization, visual codes, representation, semiotics, indigenous photography, visual culture.

Introduction. Shooting a picture is not anymore a tool to record reality. The way communities express their self-awareness and views to other people in life today is through photography that creates powerful identity building tools. According to Stuart Hall in his seminal publication on representation, meaning is created in various locations as it is transferred through various activities with visual images being among the most decisive systems of signification (Hall, 1997). This idea is extremely applicable when we see how photography intervenes between the traditional culture of the area with the universal visual trends in the present day world that are linked.

In the last few decades, cultural identity in photography has become an increasingly popular topic among scholarly researchers. Existing analysis explores the way photographic images create national identity (Schwartz & Ryan, 2003) and the way indigenous groups use photography to take back their visual representation from colonial control (Wilson & Stewart, 2008) and the way the worldwide exchange of cultural symbols happens through globalization (Appadurai, 1996). The existing research has established a complex academic debate but researchers are still required to do an organized investigation about visual codes which connect local culture to worldwide contexts and the way these codes transform during international cultural exchanges.

The study has three objectives. The research explores the way in which the contemporary photographs affect the perception of cultural identity. The paper discusses the techniques that have been applied with the native images to attain international fame and foreign visual designs to be applied to the local market. The study examines the 21st-century photography, which uses cultural codes to create a visual identity.

The study has been conducted due to the fact that numerous factors contribute to its relevance. Photography occupies a vital position in the contemporary visual culture because digital platforms generate billions of images which circulate throughout the world every day. The images possess the capability to modify the perception of individuals about themselves and their communities through their visual representation of reality. The encounter between cultures has become a common occurrence due to the fact that migration and digital communication and economic globalization have established a continuous stream of contact among them. The study of visual codes that facilitate the encounters between cultures has become a vital theoretical and practical field of investigation. The new indigenous photography movements which have emerged throughout the world present multiple serious questions regarding visual sovereignty and ethical representation and the potential for decolonizing visual perception (Smith, 2012).

Results. The theoretical framework of this study draws upon several intellectual traditions. Semiotic approaches to photography, originating in the work of Roland Barthes and subsequently developed by numerous scholars, provide tools for analyzing how photographic images produce meaning through codes and conventions (Barthes, 1981; Sonesson, 2011). The concept of the visual code is central here: it refers to systems of conventions through which visual elements acquire significance within particular cultural contexts. As Brian Curtin has demonstrated, the meanings we attribute to images are shaped by cultural ideas that we have learned, and visual representations are mediated by conventions that vary across societies (Curtin, 2007).

According to Hall's concept of representation, cultural identity is not something final, but an ongoing process of development which person receives through representational practices (Hall, 1990). According to Hall, identity emerges through the representation process rather than out of it. This understanding helps to show how the process of identity construction is assisted by photography. Photographic images create the appearances of identity through the selection by photographers of their frame, light and subject and context.

The concept of the global imaginary, developed by Manfred Steger, proves useful for analyzing the transformation of visual codes in the context of globalization. Steger defines the global imaginary as people's growing consciousness of belonging to a global community, a consciousness that is both expressed and reinforced through visual culture (Steger, 2008). Tommaso Durante's Visual Archive Project has documented how visual symbols circulate across national boundaries, creating what he calls a shared global visual landscape, while simultaneously retaining connections to specific cultural traditions (Durante, 2014).

To understanding the functioning of cultural codes in photography, it has to be accepted that photographs do not provide a neutral view of reality. Every photograph embodies choices about what to include and exclude, how to frame the subject, what moment to capture. These choices are shaped by cultural assumptions that the photographer may not even be aware of, and they communicate messages to viewers who decode them through their own cultural frameworks. Research in cross-cultural psychology has revealed significant differences in how people from various cultures perceive and compose visual images (Nisbett & Miyamoto, 2005). Western viewers tend to focus on the important elements in the photograph, applying a logically based approach, whereas the East Asian viewers tend to focus on relationships in the photograph. These visual-perceptual distinctions affect the way that images are employed by photographers.

Photographers who operate in multiple cultures need to be aware that their images will be interpreted differently by different cultural groups. One image has the potential to seem like a respectful documentary photo to one individual, but that exact image might seem stereotypical or unwelcome to another individual. This problem becomes even more severe when it comes to indigenous photography because colonial representation has established long-lasting visual stereotypes which affect the way indigenous people are viewed by others and how they view themselves.

The history of photography's relationship with indigenous cultures is troubled. From its earliest days, photography was used as a tool of colonial knowledge production, documenting supposedly vanishing peoples and creating visual archives that served the purposes of empire (Edwards, 2001). Edward Curtis's famous photographs of Native Americans exemplify this approach: while technically accomplished and now valued as historical documents, they were staged according to Curtis's romantic vision of pre-contact indigenous life, erasing the contemporary reality of Native peoples and fixing them in an imaginary past (Farrell Racette, 2011). This colonial visual legacy continues to influence how indigenous peoples are represented and how they represent themselves.

Since the 1980s, indigenous artists have been supporting a worldwide indigenous photography movement, and they have begun to control their visual representation (McNally, 2018). Indigenous photographers employ their indigenous perspective to oppose the colonial perspective, and they take back control of the visual representation. In photography, the pictures show that it serves as a powerful tool of cultural domination, and it also functions as a tool of cultural renewal, and a tool of resistance.

Patterns of Connection were created by Leah King-Smith. It is made by her through the overlay of old pictures of Aboriginal people on the pictures of the Australian countryside (Marsh, 2003). King-Smith salvages Aboriginal people out of the colonial archives and she situates them in a sense of spiritual relationship to the land. This way she goes against the depersonalising view of anthropological photography and gives a fresh emphasis on the indigenous bond to the land. This is how the artist's work allows us to see how we could talk about an archival-memorial method of cultural coding using historical images to produce new identity stories.

His professional experience has demonstrated other areas of work that the Onondaga photographer, Jeff Thomas, has completed. The stereotype that indigenous people live in the past or on rural reservation land gets challenged through the fact that Thomas has spent multiple years photographing indigenous individuals who reside in contemporary urban spaces (Thomas, 2012). His series called Corn Husks documents elderly individuals from Six Nations of the Grand River while they perform their traditional practices to show how physical memory enables cultural knowledge to survive throughout time. Thomas selects to record the making process instead of the completed artwork because he wants to demonstrate that culture exists as an ongoing process rather than a fixed historical record. This approach demonstrates a performance-ritual mode of cultural coding, or the way cultural identity is presented by recording a bodily practice.

The photos of photographers who present mixed identity and multiple cultural contacts show the third type of cultural coding. Through photographs Zimbabwean-Australian artist Chris Bryce-Watt explores her mixed identity which includes Indian and Dutch and German and African roots (Bryce-Watt 2025). Through the hybridity theory of Homi Bhabha and meshworks framework of Tim Ingold the artist shows identity as a complex cross-continental network of connections instead of a single binary structure that continues through family generations. The field of cultural photography receives one of its major advancements through this dialogical-transcultural approach which shifts the current emphasis on cultural heritage from basic record-keeping to creative representation of how individuals form their identity through social exchanges.

The transformation of visual codes in globalized photography can be observed across multiple dimensions. Visually one can note a mixture of various cultures in visual languages. As an illustration, a photographer based in Lagos would be able to combine the Yoruba visual culture with fashion photography techniques in international fashion, and a photographer based in Tokyo would be able to combine the traditional Japanese composition with American street photography styles. These combinations are not indicative of the fact that culture is lost, but is a creative process that gives photographers a possibility to create visual languages that depict the complex modern experiences. Digital technology has transformed the way in which culture distributes images through radical distribution. Photographers who are marginalized have the opportunity to exhibit their work to a global audience

through Instagram, without having to go through the traditional distribution procedures that are normally required (Manovich, 2017).

Globalization is driving the development of cross-cultural visual understanding and the way pictures are interpreted is facing a new opportunity and challenge.The pictures that are distributed in foreign markets are seen to undergo an entirely different context-based evaluation process, which is based on the context that is entirely different.In other cultures,Tech images can be interesting and in other cultures,Tech images can be stereotypical according to the photographer, who wants to discourage such stereotypes. The way images are understood shows why we need to be taught about the images and why we need to provide background information to the images as we share them around.

These changes have practical impact in different areas. Based on the findings of this study, photographers are recommended to be self-reflective by knowing their cultural background and analyzing the context in which their work is going to be evaluated and participating in the communities that they depict. According to Brown & Nicholas (2012), indigenous photographers have established ethical protocols which advocate for collaboration between photographers and communities and consent of communities prior to photographing them and returning the photographs to the communities being photographed.

Visual codes are changing in cultural museums, archives and galleries and this makes them wonder how to select, arrange and display their items. The institutions are also wondering about how to display colonial era historical pictures in the present times. The institutions are equally willing to know the way that they are able to assist the photographic work drawn from the underrepresented groups to make it known and circulate it. What responsibilities do institutions have to provide contextual information that enables appropriate interpretation of culturally specific images?

This research indicates that teachers need to educate students on cross-cultural visual literacy concepts. Students need to learn how to read and create images and visual codes and their cultural background and how images affect their identity development. Cross-cultural education enables students to understand other cultures better and teaches them how to use visual representation ethically.

The nature of specific photo projects shows how these theoretical aspects are realized in practice. Black-and-white photographs of Salgado form strong visual links between different cultures using their universal human experiences to link different geographical regions. His work operates within what may be referred to as a humanist universalist framework that aims at surpassing cultural specificities by appealing to universal human experiences (Salgado, 2013).

A different approach can be seen in the work of those photographers who are members of Magnum Photos, and who have been more concerned with the ethical and political aspects of documentary representation. One of the Magnum Foundation projects called On Religion united photographers with different backgrounds to capture religious practices in various parts of the world and it explicitly addressed the question of insider versus outsider perspective as well as the question of how far visual cross-cultural understanding can be achieved (Magnum Foundation, 2016).

The present-day African visual arts are a diverse field of study on the basis of which one can analyze the evolution of the visual codes under the influence of globalization. Zanele Muholi and other artists have used documentary photography to record the lives of the LGBTQ+ individuals in South Africa, and at the same time, their photography has been utilized in the efforts to promote visibility and to develop communities (Muholi, 2014). These artists reject the colonial exoticizing gaze and the Western visual norms and create original African visual languages that are rooted in the local cultures and political environments yet engage in the global discussions.

Photography is an important factor that needs to be examined as it influences diaspora communities. Photographs can be used by migrants and their offspring in order to retain their historical memories and identity and to retain links with their homeland when creating new identities in the communities they find themselves in. Family photographs also act as visual archives that preserve

cultural transmission and represent traditional visual elements across many generations. Diaspora photographers are now using their visual medium to investigate complex hybrid identities and the experience of the fact that people are living in two cultures simultaneously.

The present time is an era of technological development that alters the way individuals see and interact with visual images in the real world. Smartphones have made photography common since most people around the globe use smartphones to take photos. The people have the freedom to take photos anywhere they want to and use the photos. The questions are about the nature of images and how technology has modified real-world experiences through images.

Tech change will continue to alter the way photography interacts with the processes of creating and developing cultural identity, and researchers are just beginning to understand it.

The research analyzed over two hundred pictures which came from different cultures and it applied semiotic methods to determine the common patterns of visual representation of cultural identity. The analysis revealed that photographers use similar visual techniques to demonstrate cultural identity through costumes and adornments, in addition to filming culturally significant locations and environments, filming ritual practices, and demonstrating age relationships through the film. The method that photographers apply when demonstrating cultural identity varies according to their cultural background and the intent to document or create, as well as the audience they are aiming at.

Conclusions. This research paper examines the ways in which photography contributes to the development of cultural identity in the context of globalization. The study results show several distinct findings. The first finding demonstrates that photography operates as a cultural identity recording tool while simultaneously functioning as an active element in building cultural identity. Photographers establish cultural understanding through their subject selection and framing choices and composition methods, and their methods of presenting images, which determine how cultures view themselves and how others perceive them. Photography achieves maximum effectiveness in creating cultural identity when visual content moves across multiple cultural areas during the globalization period.

The study found three principal developments. Initially, there is the tendency of use of old pictures by indigenous artists who revive the colonial archives to produce new narrative forms. Secondly, there is the practice of documenting cultural practices by body-based practices in place of practices as static traditional heritage, now renders identity. Thirdly, there is an artist who deals with the hybrid identity and cross-cultural experience, inventing a new visual language to express the.

Thirdly, the visual code evolution in globalized photography can be seen in three aspects: iconography that generates new visual hybrid vocabularies, circulation facilitated by the digital technology-enabled distribution systems, and interpretation of the cross-cultural reading that produces misunderstanding and new meanings. There are changes which generate both opportunities and obstacles to cultural knowledge and visual representation.

This research benefits photographers as well as cultural organizations and educators in actual use. Based on the results, it is recommended that photographers should be self-reflexive and morally committed to the communities that they represent. Based on the findings, institutions can review their collections and curation and their method of presenting images in the proper context. Visual literacy education is recommended to the teachers based on the findings, and it should cover cross cultural concepts.

The study requires further exploration due to the fact that the outcomes are not supported by sufficient evidence. How does the technology of Artificial Intelligence influence the way the national or the community identity can be created by photography with visual content? How do the artists come up with new ways of creating visual content due to the challenges that they face in representing various cultural backgrounds? Researchers should examine both the theoretical models but also the real-life practice of photography in various cultural settings.

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INTERACTION BETWEEN POPULAR AND ELITIST CULTURE: REINTERPRETING THE CLASSICS IN THE POST-MODERN ERA

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Abstract. This article explores the reciprocal influence between contemporary high (elite) culture and popular culture understood not as mass culture, but as participatory and interpretive cultural practice. The study aims to analyse how meaning-making activities of non-professional audiences and forms of cultural co-creation contribute to the transformation of high culture in the twenty-first century. Methodologically, the research is grounded in an interpretive framework based on Stuart Hall's encoding/decoding model, combined with comparative and semiotic analysis and supported by case studies of contemporary Ukrainian artistic projects (Nova Opera, Ukraine WOW). The findings demonstrate that contemporary high culture increasingly operates as an open system of meanings, shaped by audience interpretation, everyday aesthetics, and intergenre hybridisation. It is argued that engagement with popular participatory practices does not lead to the simplification of high culture but rather enhances its communicative flexibility and expands its cultural and symbolic productivity.

Key words: high culture, popular culture (non-mass), meaning-making, participatory practices, cultural co-creation, encoding/decoding, open system of meanings.

Introduction. The culture of the postmodern era is characterised by openness, polyphony, and the multilevel nature of meanings that emerge through continuous dialogue between the creator and the audience. The boundary between «high» and «popular» culture is no longer rigid; instead, it has transformed into a space of interaction, reinterpretation, and recoding of meanings. Whereas in previous historical periods popular culture primarily relied on the simplified reproduction of high cultural models, today it functions as an interpretive environment in which audiences not only consume cultural texts but also reinterpret, recode, and transform them. At the same time, high culture increasingly integrates techniques, forms, and symbolism associated with popular culture, which significantly alters its communicative nature.

Contemporary cultural studies demonstrate that high (elite) culture and popular culture exist in a dynamic relationship of mutual influence. Popular culture not only adapts high cultural codes but also contributes to their transformation by generating new meanings through audience participation and cultural co-creation (Jenkins, 2007a; Jenkins, 2007b; Storey, 2018). Conversely, high cultural practices, through interaction with popular culture, acquire new expressive forms adapted to contemporary social and media contexts (Stanislavska, 2009; Gutierrez-Navratil, Perez-Villadoniga, & Prieto-Rodriguez, 2024; Werber, Schirra, & Schmidt, 2023). In this context, particular attention should be paid to the ways in which audiences participate in meaning-making by drawing on their own experience to interpret complex cultural codes, as well as to how high culture, through engagement with popular culture, adapts to new modes of communication.

The scientific problem addressed in this study lies in the insufficient examination of contemporary mechanisms of this mutual influence, particularly within the context of Ukrainian culture. Specifically, it remains unclear how popular culture functions as a space for the recoding of high cultural codes and how this process contributes to the renewal of high culture.

The aim of the article is to conduct a comparative analysis of contemporary high (elite) and popular culture and to clarify how meanings are formed, transmitted, and reinterpreted within the contemporary cultural space, as well as how the interpretive activity of audiences influences the renewal of high cultural forms.

Objectives of the Study. To analyse contemporary theoretical approaches to understanding culture as an open system of meanings (Geertz, Barthes, Baudrillard, Bauman, Hall). To elucidate the essence of Stuart Hall's encoding/decoding model and its applicability to the analysis of contemporary cultural processes. To identify how popular culture reinterprets high cultural models and how high culture adopts communicative strategies characteristic of popular culture.

Materials and Methods. The research material consists of theoretical works that conceptualise culture as an open system of meanings and communication (Hall, 1980; Geertz, 1973; Barthes, 1977, 1984; Baudrillard, 1994; Bauman, 2000), as well as contemporary Ukrainian interdisciplinary artistic practices (Nova Opera, Ukraine WOW) documented in scholarly publications, analytical reviews, and cultural studies research.

To address the stated research problem and achieve the aim of the study, an interpretive method grounded in Stuart Hall's encoding/decoding model (Hall, 1980) was employed. This approach made it possible to analyse the processes of reinterpretation of high-cultural meanings within popular and participatory forms of creativity, as well as the role of the audience as an active co-creator of cultural meaning. The comparative method was used to juxtapose the characteristics of high and popular culture in contemporary artistic practices in order to identify the directions of their mutual influence and the transformation of the traditional hierarchy between the "elite" and the "non-elite." Semiotic analysis enabled the examination of artistic projects as cultural texts in which the hybridisation of sign systems, styles, and modes of expression takes place. A case study approach was applied to analyse specific Ukrainian examples illustrating the transformation of high culture under the influence of popular practices and audience co-creation. General scientific methods of analysis, synthesis, and generalisation were used to systematise theoretical approaches and formulate general conclusions regarding the contemporary model of interaction between high and popular culture.

Theoretical Framework of the Study. Zygmunt Bauman (2000) emphasised that in the condition of «liquid modernity» no cultural content retains a fixed form; instead, it is constantly changing and adapting to the expectations of audiences. In this sense, popular culture functions not only as a «bridge» between complexity and everyday experience, but also as a laboratory for new forms of symbolic experience. At the same time, this process has a reciprocal character. High culture increasingly integrates elements of popular aesthetics not merely as quotations or allusions, but as fully developed artistic strategies. This tendency is manifested in the emergence of "hybrid forms," which combine academic aesthetics with elements of mass culture – from the use of video game mechanics in contemporary theatre to the quotation of pop music in symphonic works.

As observed by Roland Barthes (1977, 1984), such strategies reveal the principle of intertextuality – the ongoing dialogue between texts belonging to different cultural levels – which makes the complete autonomy of any cultural form impossible. Within this interaction, the role of the interpreter becomes central, as the interpreter simultaneously occupies the positions of consumer and creator. It is important to emphasise that popular culture is not the cultural product itself (a film or a song), but rather what consumers (viewers, listeners) do with that product: recoding, re-signification, and the attribution of personal meanings. In the contemporary digital environment, this process acquires new dimensions, as users create memes, fan videos, and remakes that represent individual interpretations of works of high culture. In this way, popular culture becomes a space of co-creation in which the boundaries between «creator» and «audience» are increasingly blurred.

From the perspective of Jean Baudrillard (1994), the symbolic interaction between high and popular culture produces a simulacral field in which authenticity loses its privileged status. The copy

may possess no less significance than the original, since its value is determined not by its source but by its capacity to generate emotional and communicative effects. This approach makes it possible to speak of a new aesthetics of interpretation, in which cultural production becomes an act of collective participation rather than the outcome of individual genius alone.

The British cultural theorist Stuart Hall, in Encoding and Decoding in the Television Discourse, formulated one of the key models of contemporary cultural theory, arguing that communication is not a linear process of message transmission but a complex structure of encoding and decoding in which meaning is produced through audience interpretation rather than solely at the moment of production (Hall, 1993).

«Decoding is not the mirror image of encoding; the message is never transparent» (Hall, 1993:514).

This implies that any cultural product may be interpreted in different ways – dominant, negotiated, or oppositional – depending on the experience, social context, and cultural mentality of the consumer. Within the context of contemporary culture, this theory acquires particular relevance, as popular culture functions not merely as a sphere of consumption but as a space for the production of new meanings.

The further development of Stuart Hall's ideas can be observed in contemporary media studies, where particular emphasis is placed on the role of the active audience. Thus, Y. Li et al. (2023) analyse content on the YouTube platform and demonstrate how users, when engaging with aestheticised videos of everyday life, construct their own interpretations of cultural codes, thereby transforming traditional notions of beauty, nature, and harmony.

«Audiences are not passive recipients but active meaning-makers who negotiate cultural and aesthetic values through their comments and remixes» (Li et al., 2023 : 62).

In this sense, popular culture emerges not as a lower level of culture, but as a communicative form in which ordinary individuals participate in the «decoding» of high cultural meanings, adapting them to their own lifeworlds.

In contemporary cultural theory, popular culture is increasingly understood not as mass-produced or low-quality culture, but as a form that adapts high cultural codes while creating a space for co-creation and active audience participation. Drawing on the encoding/decoding framework (Hall, 1993), it can be argued that audiences actively decode products of high culture, attributing new meanings to them and integrating these meanings into everyday life.

The understanding of culture as an open system of meanings (Bauman, 2000; Geertz, 1973) reveals the dynamic nature of cultural processes, in which traditional codes of high culture are subject to continuous interpretation and transformation under the influence of popular practices. Popular culture thus becomes an environment in which traditional meanings are reactivated and adapted for contemporary audiences seeking both aesthetic and transcendent experiences within everyday life.

Participation and co-creation in contemporary culture highlight the active role of audiences (Jenkins, 2007a; Jenkins, 2007b), who are no longer passive consumers but co-producers of meaning. As Jenkins notes:

«Media scholars draw an important distinction between mass culture and popular culture. Mass culture is mass-produced for a broad audience. Popular culture is what happens to those cultural artifacts at the point of consumption, when we draw on them as resources in our everyday lives. Many scholars have focused on how the same mass-produced artifacts take on different meanings for different consumers» (Jenkins, 2007b : 65).

Research by N. Werber et al. (2023) indicates that the contemporary era increasingly blurs the boundary between «high» and «low» culture, shifting this opposition into the sphere of aesthetic interaction. High culture more frequently incorporates elements of popular genres – mass media, visual clichés, and digital formats – not as a compromise, but as a strategy for expanding its audience.

«The distinction between high and low culture becomes a matter of perspective rather than hierarchy» (Werber, Schirra, & Schmidt, 2023 : 5).

Thus, popular culture functions not only as an adapter of high culture but also as an active space for the renewal and transformation of cultural codes.

Current Practices of Interaction between High and Popular Culture in the Global Cultural Space

The contemporary cultural process is characterized by an intensive interaction between elite (high) and popular culture. On the one hand, high culture increasingly integrates elements of popular and amateur practices, using them as a means of renewing form and strengthening communication with audiences. On the other hand, popular culture itself increasingly becomes a platform for representing aesthetic and philosophical meanings traditionally associated with classical art. Contemporary scholars describe such forms through the concept of *classical crossover*, understood as an intergeneric combination that creates new modes of representing classical heritage without diminishing its semantic depth (Prickett, 2013). This trend demonstrates a growing interest in dialogue between high and popular cultural levels as a way of expanding cultural communication.

One of the most illustrative examples of the interaction between elite and popular culture can be observed in contemporary opera. In particular, the work of Polish countertenor Jakub Józef Orliński is notable not only for his performances of Baroque arias but also for the active incorporation of popular dance forms, especially breaking, into his stage performances (Lech, 31 October 2025). In numerous interviews, the singer emphasizes that combining classical opera with street hip-hop movement represents a form of «re-encoding» the operatic genre – not its simplification, but an expansion of its aesthetic field. This case illustrates how high culture creatively appropriates forms originating in popular culture. Within Stuart Hall's encoding–decoding model (Hall, 1993), Orliński can be seen as re-encoding a «high» cultural message and adapting it to the perceptual horizon of the contemporary viewer, who experiences music not only aurally but also as a bodily and visual phenomenon. As John Storey notes,

«the status of opera as the pinnacle of high culture is changing as opera increasingly becomes part of everyday cultural life… Opera performers are increasingly marketed in ways similar to pop stars» (Storey, 2003 : 74-75).

Thus, opera undergoes a participatory transformation of perception: it ceases to be an exclusively elitist event and becomes accessible to broader audiences.

Another expressive example is the integration of academic ballet with street dance forms. Institutions such as the Dutch National Ballet and the Royal Ballet have produced performances in which classical ballet technique is combined with elements of breaking, popping, or locking. Major ballet companies increasingly invite choreographers from the hip-hop scene or stage productions that merge classical technique with street dance vocabulary. A notable example is the collaboration between ISH Dance Collective and the Dutch National Ballet, as well as the involvement of choreographers who introduce hip-hop aesthetics into the programs of the Royal Ballet and the New York City Ballet (Winship, 2026). In addition, Sadler's Wells has launched educational programs in hip-hop theatre and annually hosts *Breakin' Convention*, the largest hip-hop dance and theatre festival in the United Kingdom (Schnater, 25 May 2023). These practices demonstrate institutional legitimation – the recognition of street practices as acceptable material for classical stages. In this case, high cultural institutions do not merely transmit amateur elements but actively contribute to forming a new canon. According to Zygmunt Bauman (2000), this reflects a shift from stable hierarchical cultural structures to fluid ones characterized by the interpenetration of meanings. Contemporary ballet thus functions as an open system that responds to cultural impulses «from below» while simultaneously producing new aesthetic experiences.

The tendency toward synthesizing high and popular culture is also evident in contemporary musical practices. Symphony orchestras increasingly collaborate with DJs and electronic producers, creating remixes of classical works through «orchestra + DJ» concerts, EDM-orchestral projects, and popular albums that reinterpret classical themes. Young DJs remixing Mozart, Vivaldi, Bach, or Beethoven attract large audiences on social media and fill concert halls (Garcia, 21 February 2024). Projects such as *BBC Symphony Orchestra meets DJ Yoda* or *Metropole Orkest x Skrillex* have received wide media attention as attempts to rethink classical music canons through contemporary sound technologies. This large-scale wave of *classical crossover* and remix practices demonstrates how professional musical institutions adopt productive techniques from popular music – electronic sound and remixing – in pursuit of new audiences and renewed semantic resonance.

Another relevant example is the broadcasting of opera and theatre performances in cinemas (Radigales, 2013), which enables audiences not only to consume high cultural products but also to decode them through personal experience shaped by comfort, collective viewing, and digital environments. Gutierrez-Navratil, Perez-Villadoniga, and Prieto-Rodriguez observe that opera has «undergone dramatic changes as a form of mass entertainment due to cinema and the development of social networks, websites, forums, chats, and blogs provided by opera houses and opera-supporting organizations» (Gutierrez-Navratil, Perez-Villadoniga & Prieto-Rodriguez, 2024:160).

Through such hybridization—combining music, visual imagery, and new technologies – opera ceases to be an art for the selected few and becomes a source of creative interpretation for a wide audience.

Visual arts likewise demonstrate a tendency to incorporate amateur practices into the sphere of high culture. The Metropolitan Museum of Art (USA), for example, organized the exhibition *Fanmania* (2021), dedicated to fan art as a contemporary form of dialogue between artists and audiences. In Ukraine, similar initiatives have been implemented by regional contemporary art museums that involve visitors in shaping exhibitions (ContCulture, 2022). Within Henry Jenkins's concept of participatory culture (Jenkins, 2007a), fan art functions as a form of active meaning production in which audiences not only interpret works but also create new cultural products and meanings. By integrating such practices, high culture develops an open dialogical model aligned with the principles of cultural communication in the digital age.

Overall, these examples demonstrate that contemporary high culture not only preserves its autonomy but also actively renews itself through engagement with popular forms of creativity. The incorporation of amateur and street practices represents not merely genre mixing, but a rethinking of the very nature of cultural production. By adopting the language of popular culture, high culture expands its communicative capacity, while popular culture, entering professional formats, enhances the level of aesthetic reflection.

The Ukrainian Context of Co-Creation: Integrating Popular Practices into High Culture

In the cultural space of twenty-first-century Ukraine, a noticeable tendency toward the blurring of boundaries between «high» and «popular» culture can also be observed. This phenomenon is related not only to global processes of cultural hybridization but also to an internal need within Ukrainian culture for dialogue and co-creation. In this context, it is important to examine cases in which high culture actively incorporates elements of popular creativity, amateur initiatives, or practices of mass participation that transform the very structure of cultural production. K. Stanislavska has explored the specific features of opera functioning in cinematic and television formats. She analyzes how opera, historically a stage-based art form, is transformed under the influence of screen arts, contributing to its democratization and popularization. The author records a fundamental change in the social status of opera: in the seventeenth century it functioned as an aristocratic courtly entertainment, whereas in the twenty-first century opera, mediated through the screen, becomes accessible to mass audiences (Stanislavska, 2009). In this sense, high culture, while preserving its aesthetic complexity and profes-

sional quality, moves beyond traditional elitism and opens itself to the energy of collective creativity rooted in popular culture and everyday experience.

One of the most expressive examples of contemporary Ukrainian synthetic art is the activity of the Nova Opera formation – an independent musical collective that combines elements of classical opera with electronic music, video art, post-minimalism, and contemporary dance techniques. As stated on the collective's official website, «the musicians create new synthetic genres, experiment with unconventional musical and stage solutions, combining the academic tradition with VJ technologies and live electronics» (Nova Opera, n.d.). In projects such as *ARK*, *IYOV*, *GAZ*, and *Opera Lingua*, the religious and philosophical depth of classical music is combined with the energy of performance, video installations, and digital sound. These practices do not undermine high culture; rather, they reveal its potential for new forms of dialogue between professional art and contemporary audiences.

A similar logic of openness is demonstrated by the interdisciplinary media art project *ARTEFACT*, which integrates digital art, music, VR technologies, VJ installations, and elements of social activism. In the exhibition project *ARTEFACT: Chernobyl 33*, the aesthetics of contemporary technologies are combined with cultural memory and scholarly reflection on catastrophe, creating a space in which the viewer becomes a participant in the interpretation of meanings (ARTEFACT, 2019). Such practices bring the audience closer to the role of interpreter and co-creator – what Stuart Hall (1993) described as the process of «decoding» a cultural message, in which audiences assign their own meanings to the work.

Interactivity and participation have become defining features of contemporary Ukrainian art. In the field of theatre, participatory practices are actively implemented by independent stages. The *PostPlay* Theatre and *Wild Theatre* (*Dykyi Teatr*) experiment with interactive performance formats in which spectators do not merely observe but help shape the outcome of the performance or participate in content creation through social media. According to Yu. Moroziuk and L. Stepanenko, the contemporary Ukrainian art scene increasingly demonstrates not hierarchical but horizontal communication between creators and consumers, forming a new type of cultural environment – one of co-creation, where «interactivity becomes a key element of communication» (Moroziuk & Stepanenko, 2025:135).

An important direction in the popularization of high art has been the activity of Ukrainian cultural institutions that integrate digital technologies. The exhibition project *Ukraine WOW* (2025–2026), for example, employed interactive formats – workshops, virtual tours, and VR/AR exhibits – that enhanced memorability and motivation for learning (Varenytsia, 4 December 2025). Within the project, visitors were offered a participatory experience: through augmented reality, they could interact with artworks and become co-authors of meaning, reproducing a type of cultural interaction characteristic of popular culture. As O. Marynych notes, the contemporary cultural space generates diverse ideas and transmits artistic meanings that sustain traditions, reactualize values, or introduce new meanings that guide Ukrainian society toward awareness of its cultural-historical roots and contribute to the formation of national consciousness (Marynych, 2023). Contemporary Ukrainian art thus demonstrates a shift from hierarchical relations toward partnership-based interaction between artists and audiences, resulting in a cultural environment grounded in the principles of co-creation.

Giovanni Ercolani, in his study *The Maidan Museum: Preserving the Spirit of Maidan. Art, Identity, and the Revolution of Dignity*, demonstrates that the museum functions not only as a repository of materials but also as an active space for shaping civic consciousness. The author introduces the concept of *anthropological security*, whereby visitors, upon entering the museum, engage not merely in observation but in an act of self-identification. They must «decode» artistic artifacts – painted helmets and shields – not as debris or mere historical evidence but as sacred symbols of dignity. In this way, the visitor becomes a co-author of the «myth» (in the positive scholarly sense, as a value-based foundation of the nation). Participation occurs at the moment when the viewer mentally connects personal experience with the collective narrative of the exhibition, transforming a «history of revolt» into a «history of the birth of identity» (Ercolani, 2023). Without this active internal work on the part

of the visitor, the museum remains merely a storage space; it is the visitor's interpretation that effectively «activates» the museum.

Thus, contemporary popular culture functions as a space of adaptation, re-encoding, and co-creation that influences high culture and stimulates its renewal. The mechanisms of interaction include digital platforms, interactive formats, performativity, and everyday practices, all of which demonstrate the close interconnection between elite and popular cultural codes.

Conclusion. The comparative analysis of contemporary high (elite) culture and popular culture has demonstrated that their relationship in the present cultural landscape is no longer structured by rigid opposition or hierarchy. Instead, both cultural domains increasingly function within a shared communicative space in which meanings are continuously formed, transmitted, and reinterpreted. High culture, traditionally associated with professional authorship and institutional authority, now operates as an open system of meanings that is receptive to audience interpretation and participatory engagement.

The study has shown that popular culture, understood not as mass-produced entertainment but as interpretive and co-creative practice, plays a significant role in the renewal of high cultural forms. Through processes of decoding, recontextualisation, and symbolic appropriation, non-professional audiences actively contribute to the reconfiguration of aesthetic languages, narrative structures, and modes of presentation within high culture. This interaction results in hybrid cultural forms that preserve artistic complexity while enhancing communicative accessibility and relevance.

It is concluded that interpretive activity and participatory practices do not lead to the simplification or devaluation of high culture. On the contrary, they expand its meaning-making potential, reinforce its social embeddedness, and enable its adaptation to contemporary cultural conditions. The reciprocal influence between high and popular culture thus represents a key mechanism of cultural dynamism in the twenty-first century.

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ART DECO IN THE GRAPHICS OF UKRAINIAN PERIODICALS OF LVIV AND EUROPE IN THE INTERWAR PERIOD OF THE 20TH CENTURY: ZOOMORPHIC MOTIFS

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Abstract. The article provides a typology of zoomorphic motifs in the graphics of Ukrainian periodicals published in Lviv during the interwar period and analyzes their common and distinctive features in comparison with magazine covers and advertising graphics of French and other European periodicals within the stylistic framework of Art Deco.

It has been established that compositions dominated by zoomorphic motifs are characterized by asymmetry, diagonal directions, and dynamic movement, in contrast to static and symmetrical compositions in which floromorphic motifs prevail.

The study reveals the significance of stylization techniques in shaping the aesthetic and emotional expressiveness of periodical graphics. This article elucidates the specific characteristics of engaging anthropomorphism and zoomorphism within an anthropocentric context through artistic techniques and figurative means in graphic. It is substantiated that the professional and structured application of compositional tools, pictorial techniques, and stylistic innovations contributed to the creation of a new artistic image grounded in national traditions, distinguished by new aesthetic value and capable of generating new emotional responses in the viewer.

The research demonstrates that during the interwar period Ukrainian graphic art experienced a significant rise due to the activities of scholarly societies, public organizations, clergy, and cultural figures. In particular, the active engagement of the Lviv artistic milieu facilitated the integration of ethnic tradition into everyday visual culture through the aesthetics of periodical graphics. Owing to their contribution, the graphics of interwar Ukrainian magazines and newspapers, marked by national and modern features, became an important factor of cultural expression and the formation of visual identity of the era.

Key words: periodicals, zoomorphic motifs, graphics, Art Deco, stylization, Ukrainian magazines and newspapers, magazine cover, Ukrainian visual art.

Introduction. Among the numerous studies devoted to Ukrainian periodicals of interwar Lviv in the twentieth century, the issue of pictorial motifs – particularly zoomorphic ones – remains insufficiently theoretically substantiated. The identification of shared features and regularities in image-formation and form-generation in the Ukrainian visual art tradition and the stylistics of Art Deco, in comparison with Western European tendencies in newspaper and magazine graphic work of the period, substantiates the place and role of Ukrainian graphic art within the European cultural space.

The aim of the article is to examine zoomorphic motifs in the graphics of Lviv periodicals of the interwar decades in order to identify, typologize, and analyze approaches to their stylization. In addition, the study considers key compositional solutions within the context of Art Deco stylistics and their stylistic affinity with contemporary Western European examples of magazine covers.

Materials and Methods. The research employs a systemic approach that ensures the collection of factual data and specialized scholarly materials related to the field under study, as well as their systematization for analyzing the use of zoomorphic motifs in visual art and, in particular, in graphic art. The method of semantic analysis is applied to identify the symbolic aspects of zoomorphic motifs

in periodical graphics. Analytical methods are also used to determine principal stylization techniques and compositional features.

Results of the Study. The primary sources for this study include archival examples of Ukrainian and Western European periodicals, as well as scholarly research describing approaches to the stylization of biomorphic and, specifically, zoomorphic forms.

V. Mykhailenko and S. Pryshchenko identify the following methods of stylizing natural forms in graphic art and advertising: the search for analogies, transformation, the search for associations, combination, and formalization (Mykhailenko & Pryshchenko, 2012, p. 124).

Within the stylistic framework of Art Deco, zoomorphic motifs more often perform not merely a decorative function – as is the case with floromorphic motifs – but act as symbolic images that enhance the expressiveness of the composition.

Authors who analyze biomorphic and zoomorphic forms emphasize that "the animal often becomes the object of social projections: human vices, virtues, capacities, and characteristically human traits are attributed to it in the form of symbolization, enabling humans to observe themselves through that which differs from themselves" (Terenzi & Mecca, 2017, p. 205). This technique of analogy can frequently be traced in the advertising graphics of Lviv periodicals of the early twentieth century, most notably in the works of Edward Kozak and Roman Chornii.

Although floromorphic motifs are more widespread in Art Deco stylistics than zoomorphic ones, the graphics of Lviv periodicals of the interwar period offer a sufficient number of examples for art-historical analysis. The most common zoomorphic motifs (a category that also includes ornithomorphic and insectomorphic motifs) comprise graphic representations of horses (Fig. 1), birds, cats, dogs, snakes, bees, butterflies, tigers, lions, as well as domestic animals and poultry (cows, pigs, ducks, geese, chickens), among others.

Fig. 1. Stylization of horses by Sviatoslav Hordynskyi (1), 1931, and Roman Chornii (2–3), 1934

Within the internal structure of periodicals, advertising graphics demonstrate the effective use of characteristic Art Deco stylistic features. Figure 2 shows a fragment of advertising graphics: in the character of forms in Fig. (a), there is a tendency toward the typical Art Deco stylizations of eye shapes and the use of sharp-tipped and rounded contrast spots. In its pragmatic aspect, the image of a cat serves as an indicator of product quality and as an embodiment of coziness and warmth.

Fig. 2. a) Fragment of advertising graphics. Komar magazine, 1936, No. 30, p. 7. Author: Yakiv Hnizdovskyi; b) Fragment of advertising graphics. Komar magazine, 1939, No. 26, p. 7. Author's signature: «F» (Fama)

In the pictographic representation (Fig. 2.b), the zoomorphic motif is geometrized and reduced to simple geometric forms that clearly emphasize the characteristic features of the depicted animal (a pig) and the shape of meat products.

A separate type of zoomorphic motif includes trademarks and emblems of periodicals, particularly title graphic headers of newspapers, as well as logos used in advertising graphics (Yakovlev, 2012). Such images often possess a pictographic character; the figures are silhouetted, depicted in profile, and primarily decorative, frequently employing symmetrical composition (Fig. 3).

Fig. 3. Graphics of logos for the periodical Vistnyk, Lviv, 1933. Authors: Vasyl Dyadyniuk and Mykola Butovych – (1–2). Advertising graphics with trademarks from the publications Nova Khata, 1939, and Historical Calendar-Almanac of Chervona Kalyna, 1937 – (3–4). Author unknown

https://archive.org/details/Nova-xata--1939--15-16/page/n17/mode/2up?view=theater
https://dontsov-nic.com.ua/wp-content/uploads/2015/12/Visnyk-1933-03.pdf
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https://irbis-nbuv.gov.ua/cgi-bin/irbis_ir/cgiirbis_64.exe?Z21ID=&I21DBN=ELIB&P21DBN=ELIB&S21STN=1&S21REF=10&S21FMT=online_book&C21COM=S&S21CNR=20&S21P01=0&S21P02=0&S21P03=FF=&S21STR=00008347

Subsequent examples of advertising graphics also demonstrate a common stylization technique in which the silhouette is reduced to a solid monochrome shape or constructed with a single line while preserving realistic proportions and contours. The use of a solid black silhouette with emphasized details rendered by a thin contrasting line originates in ancient Greek archaic art and is reinterpreted in simplified, geometrized form within Art Deco stylistics.

At a time when the world was fascinated by the discoveries of Egyptian tombs and a wide range of exotic ethnic motifs, the Art Deco style developed in parallel with modernist movements, combining progressive modernity with the refined decorative aesthetics of previous epochs and frequently drawing on classical traditions in compositional construction. All these tendencies were also reflected in the Ukrainian press of Lviv (for example, in the graphic header of the magazine «Svit» [World]).

Fig. 4. a) Advertisement for the Lviv factory «Fortuna Nova» in the newspaper Dilo. Author: Sviatoslav Hordynskyi; b) Title graphic header of the newspaper Ridna Shkola, Lviv, 1932

https://encrypted-tbn2.gstatic.com/images?q=tbn:ANd9GcSX8Mk-BC0EhLto1oskuC0bpfR01EWpiorzJ2MXytzQ5N9ZFYYY
https://www.instagram.com/p/DTbOFbqjj5m/?img_index=6

However, in Ukraine there existed its own rich ethnic tradition, toward which interest increased at the beginning of the 20th century due to the risk of assimilation and the threat of "blurring" and oblivion. Owing to the activities of scholarly societies, public organizations, the clergy, and cultural figures – particularly representatives of the artistic milieu of interwar Lviv such as Sviatoslav Hordynskyi, Pavlo Kovzhun, Olena Kulchytska, Mykola Holubets, and others – this tradition was not only systematized in academic literature and preserved in museum collections, but also integrated into everyday visual culture, notably through the aesthetics of periodical graphics.

Within the diverse stylistic environment of the time, Ukrainian artists actively experimented with forms, compositions, and symbolism, combining contemporary stylistic innovations with national imagery in the graphics of printed periodicals.

Such explorations are also evident in the graphic solutions of Mykola Butovych, where, alongside masterfully stylized floromorphic forms, a zoomorphic motif – a bird – appears on the cover of Nova Khata (1929, no. 1). The laconic, geometricized graphics of the cover are at the same time imbued with decorativeness and the richness of linear and dot elements that form the image of the bird.

Fig. 5. Stylization of a bird and floromorph motifs on the cover of the magazine Nova Khata. Author: Mykola Butovych. Lviv, 1929.

https://archive.org/details/Nova-xata--1929--12/mode/2up?view=theater

In the advertising graphics of periodicals, animals were often likened to humans through the expression of emotions (laughter, sadness, fear, pleasure) or by being depicted in a bipedal stance and in clothing – following the principle of anthropomorphism – as well as through the attribution of human habits (for example, smoking) as metaphorical images.

Fig. 6. Caricature stylization of a rabbit, horses, and a cat in advertising graphics from the magazine Zhinka, issues 13–14, August 1935, as well as from the periodicals Nash Lemko and Ukrainski Visti. 2–3: Author: Roman Chornii. Lviv, 1935–1939.

https://violity.com/ua/120842776-zh-nka-dvotizhnevik-lviv-serpen-1935-ch-15-16?utm_source=other_seller_items&utm_medium=zh-nka-dvotizhnevik-lviv-serpen-1935-ch-15-16&utm_campaign=600uah
https://shron1.chtyvo.org.ua/Nash_lemko/1935_Chyslo_21_45.pdf?
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https://polona.pl/item-view/7a93c1a0-884d-4add-a122-cf0a25e70e19?page=7

In a substantial portion of the graphics of sections, advertisements, and illustrations within the internal structure of the publications, zoomorphic motifs retain recognizable forms and proportions, but overall their treatment is simplified, and the images are, for the most part, realistic, and less frequently metaphorical (Fig. 7).

Fig. 7. a) Advertising graphics in the periodical Ukrainski Visti, Vol. 5, No. 20, 1939. Author unknown.
b) Ukrainski Visti, No. 25, 1939. Author: Edward Kozak (Ek, Eko).
c) Narodna Sprava, Vol. 2, No. 11, 1929. Author: Edward Kozak.

https://polona.pl/item-view/54be0a7e-ffb2-4a91-8f38-0c2a6cf09d54?page=7
https://polona.pl/item-view/fa8112f7-b647-4b10-8efc-0faa039857de?page=2
https://polona.pl/item-view/35bd7c08-9a5b-4cd8-9725-679ae2346ded?page=0

It should be noted that for graphic compositions within the internal structure of periodicals, adaptability to scaling was essential, along with maximum informativeness and visual impact within a limited format (often very small scale) and, due to the specifics of printing processes and their cost, the use of restricted graphic means (application of a single ink layer). In the graphics of covers of Ukrainian periodicals published in Lviv, the predominant use was a single achromatic or chromatic color (often also serving as the background), less frequently two spot chromatic colors; multicolored covers were most often characteristic of yearbooks and calendars.

A photograph published in the magazine «Na Slidi» (Fig. 8) shows that Ukrainian periodicals (in the photograph one can discern such publications as Novyi Chas, Narodnia Sprava, Ukrainski Visty, Silskyi Hospodar, Dilo, Litopys Chervonoi Kalyny, Komar, Ukrainsky Invalid, and many others) were represented at exhibitions in Paris alongside those of other European countries, which testifies to the diversity of types and thematic directions of the periodicals, as well as to the high quality of their graphic treatment.

Вистава української преси на світовій виставі в Парижі. На знимці бачимо примірники „На Сліді"

Fig. 8. Na Slidi, magazine of Plast youth, December 1937, No. 12.
URL: http://old.avr.org.ua/index.php/viewDoc/21567/

Examples of foreign magazine covers with compositions featuring zoomorphic motifs, just like the Ukrainian publications of interwar Lviv, demonstrate devices such as the use of asymmetry and both simple and more complex rhythmic structures. European examples of covers predominantly employ more than two chromatic tones and tonal gradients (Fig. 9). General tendencies of Art Deco stylistic devices, such as a monochrome silhouette combined with a contrasting thin line or the construction of form with a single line, were actively employed by European artists.

The most frequently used zoomorphic motif is the image of the horse, symbolizing speed and strength, endurance, freedom, and independence, most often positioned hierarchically in relation to an anthropomorphic motif (Marchesini & Bussolini, 2016). In the internal graphics of foreign periodicals, the image of the horse was used in advertising automobiles, motor oils, and competitions. A comparative analysis of Ukrainian and European approaches to the stylization of the horse image demonstrates a significant number of shared features and the absence of substantial differences (Figs. 1, 10). The common element is the use of symbolism. Researchers of artistic devices note that «symbols and metaphors often reflect powerful cultural norms and values; therefore, their use can also serve as a means of preserving and transforming cultural perceptions» (Sosnytskyi, 2024, p. 146).

On the covers of the journals «Art et Industrie» and «Miroir du Monde» (fig. 11), the authors employed a characteristic Art Deco stylistic technique: a flat depiction of zoomorphic motifs with realistic proportions, interpreted through the contrast of a monochrome silhouette and a thin line. Another characteristic device is the rhythm of silhouettes.

Fig. 9. Cover of the magazine Emporium. Author: Diego Santambrogio. 1929. Italy. Cover of Harper's Bazaar. Author: Erte. 1935. New York–Paris.
https://encrypted-tbn1.gstatic.com/images?q=tbn:ANd9GcTYASYOtdpteHKH7O_aVm1A53Xt7vg8uioWpcnDPR16aJGwfzrv
https://i.pinimg.com/736x/c6/21/f5/c621f569d6f3c629346522b83817807e.jpg

Fig. 10. a) Cover of a catalog. Author: Jean Carlu, 1930. France.
b) Cover of the magazine Advertising Arts, 1934. Author: Joseph Binder. Austria.
c) Advertising illustration "Antar". Author: L. Gadoud.
https://i.pinimg.com/736x/d4/b7/b9/d4b7b9f4ca584af7019badd1c0d8ea39.jpg
https://img.leboncoin.fr/api/v1/lbcpb1/images/f3/7d/87/f37d877cd5b94f5626d5bf4826f27520365a21d2.jpg?rule=ad-large
https://hprints.com/en/item/60197/Antar-1928-L-Gadoud-Art-deco-poster-art

Subsequent graphic compositions on the covers of «Art et Industrie» by the renowned Art Deco master Charles Loupot (Fig. 12), as well as examples of advertising graphics within the structure of periodicals (Figs. 13–14), demonstrate the construction of a zoomorphic silhouette using a thin line of constant thickness.

Compared to foreign examples, Ukrainian graphics do not display the homogeneous refinement characteristic of European periodicals and Art Deco stylistics; more realistic forms are noticeably predominant. It is also worth noting that floromorphic motifs exhibit a higher degree of stylization, which is обусловлено the nature of folk ornamentation, in which plant forms dominate and which served as a source of inspiration for Ukrainian artists.

Conclusion. Zoomorphic motifs in the graphics of Lviv periodicals can be divided into two categories:

- decorative symbolic zoomorphic motifs (cover graphics), as well as decorative motifs executed in an authorial manner (advertising graphics, vignettes, section headers);

• zoomorphic motifs of illustrative, realistic character (visual illustrations accompanying sections, literary works, and advertising).

Fig. 11. a–b) Covers of the magazine Art et Industrie. Author: Paule Max-Ingrand, 1933. France. c) Cover of the magazine Miroir du Monde. Author: Leonetto Cappiello, 1937. France.
https://hprints.com/s_img/ng_md/61/61832-paule-max-ingrand-1933-art-et-industrie-cover-9d63a98ba36b-hprints-com.webp
https://img.leboncoin.fr/api/v1/lbcpb1/images/f3/7d/87/f37d877cd5b94f5626d5bf4826f27520365a21d2.jpg?rule=ad-large
https://www.thevintageposter.com/Art_Images/Medium/20082.jpg

Fig. 12. Covers of the magazine Art et Industrie. Author: Charles Loupot, 1932. France.
https://hprints.com/en/search?q=ART+INDUSTRIE&p=1&met=syn

Fig. 13. a) Advertising illustration «Fly-Tox». Author: Albert Pouprou (Alprou), 1930. France. b) Advertising illustration «Campari». Author: Orsi, 1939. France. c) Advertising illustration «Guerlain». Author: Darcy. France. Images sourced from: hprints.com

Fig. 14. Advertisement for «Gévelot» cartridges, 1928–1931.
Author: Francis Bernard. France. Image sourced from: picclick.fr

In the compositional structure dominated by zoomorphic motifs, greater asymmetry, diagonal directions, and dynamism are consistently observed, in contrast to static and symmetrical compositions dominated by floromorphic motifs.

Among stylization techniques, the hyperbolization of certain parts of the animal figure predominates, as well as the assimilation of animals to anthropomorphic human forms, character traits, and habits; symbolic imagery is widely used, while metaphorical images occur less frequently. In contrast, European examples more often demonstrate metaphorical representations of zoomorphic imagery and hyperbolization in the treatment of silhouettes.

Zoomorphic motifs in periodical graphics were used to establish an emotional connection through symbolism and anthropomorphism.

From a pragmatic perspective, the use of zoomorphic motifs played an important communicative role through the assimilation of zoomorphic imagery to human qualities (such as emotionality, habitual behavior, or everyday scenes).

Taking into account the functional and thematic typology of periodical graphics, the predominant artistic devices include:

- hyperbole in all types of periodical graphics;
- metaphor in advertising graphics and graphic headers / decorative vignettes;
- symbol in cover design;
- allegory in narrative humorous illustrations.

In Ukrainian publications, symbols were employed as one of the artistic devices to emphasize the significance of themes such as freedom (bird), strength and speed (horse), diligence (bee), and so forth, as well as to reinforce the notion of identity (national symbols).

The symbolism of zoomorphic motifs was most strikingly manifested in the design of magazine covers.

It is important to note that symbols and metaphors frequently reflect powerful cultural norms and value orientations; therefore, their use by artists and designers can serve as a means of preserving and transforming cultural perceptions and values.

As a result of the artist's professional and structured use of compositional and artistic techniques, visual means, and distinctive methods of stylization – particularly in the graphics of periodical publications – a new artistic image was formed that drew on national traditions, acquired new aesthetic value, and evoked new emotional responses.

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VOLUNTARY AND COMMUNITY INITIATIVES TO PRESERVE UKRAINE'S CULTURAL HERITAGE DURING THE RUSSIAN-UKRAINIAN WAR

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Abstract. The article examines the problem of preserving Ukraine's cultural heritage in the context of the full-scale war unleashed by Russia in 2022. The authors emphasise that the destruction of monuments is not only a material loss but also an element of cultural genocide aimed at destroying the historical memory and national identity of the Ukrainian people. Particular attention is paid to the role of civil society organisations and volunteer initiatives, which are key actors in the rescue of cultural values, the organisation of digital conservation, evacuation and documentation of monuments. Examples of the activities of local headquarters, the Centre for the Rescue of Cultural Heritage, the international SUCHO initiative and UNESCO programmes are considered, demonstrating the effectiveness of civic solidarity and coordination with state and international structures. The article shows that it is the active participation of civil society organisations that allows for a rapid response to threats, combining modern technologies (3D scanning, digital archives) with historical practices, as well as strengthening the moral and humanistic dimension of heritage preservation. The study is based on analytical, historical-descriptive and comparative methods, combining theoretical analysis of scientific sources with practical study of specific volunteer and public initiatives. The work proves that the protection of cultural heritage in wartime is not only a humanitarian task, but also an act of spiritual resilience, national self-affirmation of Ukraine and a testament to the strength of civil society.

Key words: Ukrainian cultural heritage, Russian-Ukrainian war, cultural genocide, volunteer initiatives, community organizations, cultural resistance, digital preservation, 3D scanning, archiving, documentation of destruction, historical memory, national identity, humanitarian protection, international cooperation.

Introduction. The relevance of preserving Ukraine's cultural heritage during wartime cannot be overstated. Russia's full-scale aggression, which began in 2022, has presented Ukrainian society not only with humanitarian and military challenges, but also with a threat to the very identity of the nation.

Cultural heritage plays a key role in shaping national identity, as it accumulates historical experience, value orientations and symbolic meanings that form the basis for the development of society. In times of military conflict, these objects take on special significance as material and spiritual markers of collective memory, attesting to the community's right to its own history, culture and territory. Their destruction poses a threat not only to cultural heritage, but also to the humanitarian potential of the nation, as it deprives people of a sense of belonging, continuity and inner support. Therefore, the protection and preservation of cultural heritage in wartime is not just a professional or administrative task, but an important humanistic imperative aimed at protecting human dignity, historical memory and the future development of the country.

In wartime, when the threat to cultural values is immediate and urgent, the activities of volunteer communities, public organisations and local initiatives, which become the first line of defence for cultural heritage, take on particular importance. Their work goes far beyond technical procedures: by saving archives, evacuating works of art, fortifying monuments and creating protective structures, they are performing an act of humanitarian responsibility aimed at preserving historical and cultural memory. Each such step is a manifestation of deep humanity, solidarity and devotion to one's culture, and at the same time – moral resistance against attempts to destroy cultural heritage. In this context, the protection of monuments is not only a professional necessity but also an ethical duty of society, because the preservation of cultural heritage means the preservation of the spiritual foundation of a people, their right to memory, dignity and a future.

At the same time, the relevance of the topic highlights the need for a systematic approach to preserving cultural heritage, which involves combining state strategies, international standards, scientific recommendations and modern digital technologies.

At the state level, Ukraine is implementing a number of strategic documents aimed at identifying, protecting and restoring cultural objects, in particular through the creation of a National Register of Damaged Monuments, inter-agency coordination and the involvement of experts in the monitoring process. These steps provide an institutional framework for volunteer and community initiatives, facilitating the exchange of information and resources.

At the same time, the integration of international standards, such as the provisions of the 1954 UNESCO Convention on the Protection of Cultural Property in the Event of Armed Conflict and the ICOMOS (International Council on Monuments and Sites) Guidelines, allows for the implementation of uniform approaches to damage assessment, conservation and restoration of sites. This contributes to the harmonisation of Ukrainian practices with global efforts to preserve heritage during wartime.

Equally important are scientific recommendations that form the methodological basis for the restoration and digital archiving of monuments. The use of 3D modelling, photogrammetry, geoinformation systems and digital archives ensures accurate documentation, recording of the extent of damage and the possibility of virtual reconstruction.

Thus, the activities of volunteers and civil society organisations in Ukraine are not isolated – they are integrated into state policy, the international context and scientific practice, forming a multi-level system for the protection of cultural heritage.

Research status. Historiographical studies on the preservation of Ukraine's cultural heritage during the war demonstrate the importance of combining state strategies and public initiatives in preserving national memory.

Thus, Yu. Trach, in his work «Cultural Heritage in Ukraine: Initiatives for Preservation and Optimisation of Protection», emphasises a comprehensive approach that involves not only regulatory and organisational models for the protection of monuments, but also the use of modern digital technologies for monitoring and restoring objects. The author stresses that effective protection of cultural heritage in wartime is impossible without a systematic approach, professional training of specialists, and coordination of efforts at all levels (Trach, 2025).

In turn, V. Nadolska, in her work «Public Initiatives for the Preservation of Cultural Heritage Sites in Ukraine (2022-2023)», reveals the humanistic dimension of the topic, focusing on the activities of community and volunteer groups, youth groups, and expedition teams who documented destruction, recorded damage, and created databases for the future restoration of cultural values during the war (Nadolska, 2024). Her research pays particular attention not only to the methods of recording objects, but also to the participation of people who risk their own lives to preserve the memory of the nation's spiritual and cultural heritage for future generations. Together, these works form a contemporary scientific discourse that combines the technical, organisational and humanistic aspects of heritage preservation, emphasising that any physical destruction of a monument can only be compensated for by human dedication, care and the indifference of society (Nadolska, 2024).

In this context, it is also important to understand the problem at the level of international scientific discourse. The study conducted by the authors of the article «Crime against memory or cultural genocide? On the destruction of the cultural heritage of Ukraine during Russian aggression in the 21st century» emphasises that the deliberate destruction of Ukrainian cultural objects has not only a material but also a deeply symbolic dimension (Kravchenko, Kyzymenko, Husieva, & Krasilnikova, 2022). It is an attempt to deprive a nation of its right to its own history and identity, to erase its spiritual code, which has been formed over centuries. Therefore, the concept of «cultural genocide» is increasingly being used in scientific circles, as the destruction of heritage is aimed at undermining the foundations of national memory, without which it is impossible to imagine the future of the country (Kravchenko, Kyzymenko, Husieva, & Krasilnikova, 2022).

The theoretical aspects of developing approaches to preserving cultural heritage are discussed in the work «Cultural Heritage of Ukraine: Theoretical Foundations and Principles of Preservation» (Kyzymenko, Husieva, 2022). The authors emphasise that cultural heritage is not only a collection of material monuments, but also a symbolic space that shapes the values, moral guidelines and worldview of a nation. That is why its protection requires a combination of legal, cultural and educational approaches. The researchers emphasise that in the 21st century, the protection of cultural values requires the integration of scientific knowledge, interdisciplinary cooperation, active community participation and the formation of new principles that take into account the challenges of a globalised world and military threats (Kyzymenko, Husieva, 2022).

As the World Economic Forum emphasises, «An attack on a nation's cultural heritage can have far-reaching consequences. It is equated with an attack on freedom of thought, conscience and religion – and is described as a critical component of genocide» (Letzing, 2022). In this context, the creation of digital archives, the documentation of destruction, and the work of volunteers become not only a means of preserving memory, but also a tool for international justice, as demonstrated by the example of the National War Archive in Ukraine, which contains thousands of videos, photographs, and eyewitness accounts (Semeniuta, 2023).

Thus, volunteer and community initiatives to preserve Ukraine's cultural heritage during the war should be seen not only as a response to immediate destruction, but also as a manifestation of profound humanity, solidarity and love for one's homeland. Their activities are both an act of care and civic responsibility, combining local actions with global discussions about the value of cultural heritage as a universal foundation of human existence. Thanks to this, the preservation of monuments becomes not only a matter of history, but also a moral obligation of society to future generations, because every saved artefact preserves a piece of our collective soul.

The purpose of the article is to examine the role of volunteer and community initiatives in preserving Ukraine's cultural heritage in the context of full-scale war, to analyse their forms of activity and interaction with state and international institutions, and to identify the potential of digital technologies as an effective tool for supporting these initiatives in protecting national memory and cultural identity.

Results and Discussion. With the start of Russia's full-scale invasion of Ukraine, one of the most notable examples of volunteer and public initiatives in the field of culture is the Save Ukrainian Culture charity campaign, which was announced on 25 April 2022 by the Ministry of Culture and Information Policy of Ukraine (since 29 October 2025 – the Ministry of Culture of Ukraine), the Ukrainian blockchain company Everstake, and the State Agency of Ukraine for Arts and Art Education (Save Ukrainian Culture, 2022).

The initiative aims to bring together Ukrainian and international experts – artists, architects, museum curators, restorers – to coordinate efforts to preserve the national cultural heritage. The project combines state support, civic engagement and digital technologies, which is in line with contemporary approaches to cultural policy in the context of military conflict (MKIP razom z Everstake, 2022).

One of the key tasks of the initiative is to record cases of destruction of cultural objects – museums, architectural monuments, libraries – and document the extent of their damage. According to the MCIP, at the time of the project's launch, more than 200 cultural heritage sites had been damaged (MKIP vzhe zafiksovano bilshe 200 epizodiv, 2022). This data forms the basis for further analysis, restoration plans and international advocacy for the restoration of Ukrainian cultural heritage sites.

The campaign also provides funding for restoration projects, ranging from the restoration of historic buildings to the restoration of museum exhibits, library collections, and archives. An important aspect of Save Ukrainian Culture's activities is to increase the international visibility of Ukrainian culture, which is seen as a form of cultural resistance to attempts to destroy or delegitimise Ukrainian identity. In this context, cooperation with international partners and information and media campaigns aimed at mobilising the global community are being actively developed. Well-known Ukrainian artists have become ambassadors for the initiative, including the Kalush Orchestra, rapper Skofka, and the popular blogger Stepan the Cat from Kharkiv, who has over 1.3 million followers. This creative approach to communication demonstrates a desire to attract new audiences, raise international awareness of the issue of preserving Ukrainian culture, and create an emotional bridge between art, technology, and social solidarity.

Save Ukrainian Culture is not only a charity campaign, but also a symbol of cultural resistance, demonstrating that the destruction of cultural objects is an attempt to erase the history, identity, and collective memory of a people. The combination of technological solutions with art and heritage is forming a new model of cultural diplomacy, within which Ukrainian artists, museum curators and architects are actively representing Ukraine on the international stage.

Another important example of civic consolidation is the «Cultural Heritage Rescue Centre initiative», established on 1 March 2022 in Lviv (U Lvovi stvoryly «Tsentr poriatunku kulturnoi spadshchyny», 2022). The organisation was established as a volunteer rapid response centre to assist state institutions and cultural establishments in the protection, evacuation and conservation of historical and cultural monuments, sacred buildings and museum collections.

An important area of the Centre's activity has been the establishment of international partnerships. In particular, the organisation sought support from the Committee for Aid to Ukrainian Museums (Komitet Pomocy Muzeom Ukraińskim) in Poland, which acted as an intermediary in the supply of technical equipment and materials for conservation. A humanitarian hub was set up at the Warsaw Uprising Museum, where large amounts of aid from European countries were received. Thanks to the centralised transport of materials to Ukraine, it became possible to respond quickly to the needs of cultural institutions, even in frontline regions (Tsentr poriatunku kulturnoi spadshchyny, 2022).

The Centre's activities covered a wide geographical area – from the Lviv and Volyn regions to Ukraine's «hot spots» – Kherson, Sumy, Kharkiv, Dnipro and Luhansk. Effective coordination through volunteer networks, WhatsApp groups, WeTransfer file sharing, and crowdfunding platforms ensured the preservation of numerous art collections that were under real threat of destruction.

The public initiative «Centre for the Rescue of Cultural Heritage» is a striking example of the institutionalisation of the volunteer movement in the field of culture and a model of effective interaction between state, public and international structures. Its activities convincingly demonstrate that even in times of greatest danger, society is capable of consolidating around common humanistic values.

In March 2022, in response to the unprecedented threat of destruction of Ukrainian cultural heritage, a unique international initiative was launched – the Saving Ukrainian Cultural Heritage Online (SUCHO) project. It was founded by a group of digital humanities scholars – Anna Kiyash (Tufts University), Quinn Dombrowski (Stanford University) and Sebastian Majstorovich (Austrian Centre for Digital Humanities and Cultural Heritage) (Dombrowski, Kijas, Majstorovic, 2022). It was the combination of their scientific experience and civic sensitivity that made it possible to create an effective platform capable of responding quickly to the threat of cultural data loss in real time.

The main goal of SUCHO is the rapid preservation and archiving of digital resources containing information about Ukrainian cultural heritage. This process involves not only the technical copying of websites, but also the formation of a comprehensive digital memory system that guarantees the long-term existence of cultural artefacts in a secure information environment, regardless of political, technical or military circumstances.

In a broader context, SUCHO's activities implement the concept of «digital humanitarian intervention» – a new phenomenon in contemporary cultural policy, where communities of scholars, IT specialists and civil society activists become defenders of the cultural rights of nations in crisis situations (Dombrowski, Kijas, Majstorovic, 2022). This approach goes beyond the traditional understanding of humanitarian aid: it combines science, technology and moral responsibility in a common desire to preserve what shapes human dignity – culture.

The Saving Ukrainian Cultural Heritage Online (SUCHO) initiative is not just a technical or volunteer project – it is a strategic cultural phenomenon of global significance that is shaping new standards of behaviour for the international community in the field of cultural heritage protection.

Ultimately, Ukraine's experience with SUCHO has set a precedent on a global scale. It has convincingly demonstrated that culture can be protected not only within the physical walls of museums, but also in virtual space, where digital representation replaces destroyed materiality. SUCHO has opened up a new paradigm – digital ethics of heritage preservation based on trust, openness and cooperation. This project has become not just a response to the crisis, but a model of digital resistance and moral responsibility in a world where war, disinformation and technological risks threaten the very idea of historical memory. Its activities convincingly prove that in the struggle for culture, it is not force that wins, but memory; and it is memory that forms the spiritual foundation of civilisation.

During a period of full-scale war, the activities of the Heritage Rescue Headquarters play an important role in preserving Ukraine's cultural heritage. Its creation was a kind of mobilisation of the cultural front, bringing together representatives of various professional communities – museum workers, architects, archaeologists, volunteers and international partners. The activities of the Heritage Rescue Headquarters are coordinated by UNESCO, the International Council of Museums, ICOM-Disaster Resilient Museums, ICCROM – conserving culture, promoting diversity, and other institutions and rescue initiatives in Ukraine and around the world (Shyian, 2023).

The main mission of the headquarters is to survey, record and coordinate first aid measures for cultural heritage sites in areas affected by hostilities. The headquarters' activities are aimed not only at technically recording damage, but also at preserving historical evidence and cultural memory. The headquarters' staff inspected religious sites with damaged roofs and wall paintings, documented destroyed museum exhibits, and carried out rescue work in libraries where valuable books and archival documents were at risk of destruction.

The headquarters' activities were particularly intense in the Chernihiv, Sumy and Kyiv regions, which suffered the greatest cultural losses as a result of hostilities and shelling. In particular, a series of expeditions were conducted in the Chernihiv region using 3D scanning, laser scanning and aerial photography technologies to document the condition of monuments with high precision, with the participation of Ukrainian and international experts (Holubka, Portareskul, 2022). In the Sumy and Kyiv regions, damage was monitored, photo and video evidence of destruction was collected, and a database was created for further analysis and planning of restoration work. During the first six months of work, the headquarters' specialists surveyed more than 400 cultural heritage sites (Shyian, 2023). This result demonstrates the high level of coordination, professionalism and social responsibility of the initiative's participants.

The new expeditions after the de-occupation of the Kharkiv region were particularly significant, as members of the headquarters documented the extent of the cultural heritage losses in this region. They worked not only as researchers but also as guardians of collective memory, creating a unique

archive of destruction, which in the future will become the basis for restoration programmes and evidence of the aggressor's crimes at the international level. For example, in the Kharkiv region, damage to more than 50 churches and more than 20 museums was recorded, where volunteers, on a voluntary basis, protected cultural heritage artefacts from further destruction and destruction, and also made 3D scans of architectural monuments for digital conservation (Monitorynh spadshchyny zadlia vidnovlennia, 2023).

Based on the collected data, an information system for monitoring heritage has been created, which is constantly updated and supplemented with new information. This database stores not only photographs of damage and detailed documents according to the ICCROM (International Centre for the Study, Conservation and Restoration of Cultural Property) methodology, but also eyewitness accounts that provide an emotional and human dimension. This system allows the condition of monuments to be recorded in real time, the extent of damage to be documented, restoration processes to be monitored and restoration work to be planned. It also allows digital copies of endangered objects to be created, making them accessible to researchers, restorers and a wide audience anywhere in the world. Through the integration of aerial photography and 3D modelling, each monument is recorded in both physical and digital form, ensuring that its shape, details and symbolic significance are preserved even in the event of physical destruction.

The activities of the Heritage Rescue Headquarters in the frontline regions of Ukraine are not only a technical or restoration process, but also an act of cultural resistance aimed at protecting historical memory and national identity. The restoration of museums, estates and temples in the affected regions will not only be evidence of the physical revival of architectural objects, but also a sign of the victory of Ukrainian culture, which has survived despite the challenges of war. This confirms that the preservation of cultural heritage is an integral part of the process of national renewal and the affirmation of Ukraine in the global cultural space.

The activities of public volunteer headquarters have become living proof that cultural heritage is not only a matter for specialists, but above all a manifestation of civic consciousness and love for one's native land. The self-organisation of people in different cities of Ukraine has shown that in the most difficult moments of history, it is ordinary citizens who become the true guardians of culture. They have proven that heritage can be protected not only by law or technology, but above all by the strength of spirit, responsibility and an inner need to preserve the memory of their people.

Such civic activism has also found support at the international level. In particular, UNESCO announced the launch of an initiative to preserve Ukraine's Jewish documentary heritage, aimed at supporting Ukrainian archives and memory institutions in wartime. The programme involves the digitisation of documents that are at risk or already damaged in 10 memory institutions across the country. In addition, there are plans to train more than 50 cultural specialists in preservation techniques and to support artistic and research projects that highlight the contribution of Jewish heritage to Ukrainian culture (UNESCO launches initiative to preserve the Jewish documentary heritage of Ukraine, 2025). Thus, the combination of local citizen initiatives and international support demonstrates a comprehensive approach to preserving cultural heritage even in conditions of military conflict.

For example, the Backup Ukraine initiative is an international project designed to protect Ukraine's cultural heritage in the digital space. The Backup Ukraine initiative emerged as an innovative platform and mobile technology that allows Ukrainian citizens, as well as the international community of interested parties, to perform three-dimensional (3D) scanning of cultural objects – monuments, memorials, historic buildings, sculptures – using a mobile phone, in particular the Polycam app (Backup Ukraine, 2022). The resulting digital models are archived in a cloud environment, forming an open database of cultural heritage (Blue Shield International; WTOP News; World Economic Forum).

The Backup Ukraine project ensures the preservation of visual and structural information about cultural objects, even in the event of their physical destruction. Thus, the initiative emphasises that

culture in wartime is not a peripheral sphere, but an integral element of national security and self-identity. The project sets a unique technological precedent by engaging mass volunteer participation via mobile devices to record and archive heritage during hostilities (Backup Ukraine, 2022).

The Backup Ukraine initiative has the potential to become not only a digital archive in emergency conditions, but also an element of Ukraine's future state cultural heritage management system. According to UNESCO documents, Ukraine must develop a digital infrastructure for heritage preservation by 2026, creating unified registries and databases (UNESCO, Action Plan for Culture in Ukraine, 2024). In this context, Backup Ukraine can serve as a model for international programmes documenting cultural losses in areas of armed conflict.

Backup Ukraine can be seen as a new front in documentation, where a smartphone camera becomes a tool for protecting heritage, and every citizen becomes its guardian. The initiative combines technological innovation, civic responsibility, and international cooperation, forming a comprehensive model for the future – one in which the preservation of cultural heritage is the foundation of national resilience and part of global cultural security.

Among the current initiatives aimed at protecting and restoring Ukraine's cultural heritage in the context of full-scale war, the Argo project occupies a special place. It is not just a digital database, but an element of the information front, where Ukraine opposes Russian propaganda and long-standing attempts to appropriate Ukrainian history and culture (Proekt Arho – Povernennia ukrainskoi kulturnoi spadshchyny, 2022).

The project brings together volunteers, professional historians, art historians, researchers, and concerned citizens who are joining the great cause of documenting and returning Ukrainian cultural heritage. Unlike traditional state mechanisms, Argo's activities are based on the power of an active civil society.

The main goal of the project is to create an open, structured database of artefacts that have been stolen, illegally exported or are at risk of destruction. This database is populated by anyone who wishes to contribute via a special form on the website, after which the information is moderated and published. In this way, the protection of cultural heritage ceases to be exclusively a state task and becomes a joint endeavour of society.

Argo is working not only to gather facts, but also to establish a legal basis for the future repatriation of artefacts. Recording the circumstances of their removal, identifying the individuals and organisations involved, and analysing the systematic looting will form the basis for further restitution processes and bringing those responsible to justice.

A separate section of the website, «Crimea», demonstrates how the occupying authorities are using cultural monuments as a tool of propaganda and an attempt to legitimise the occupation (Proekt Arho – Povernennia ukrainskoi kulturnoi spadshchyny, 2022). This clearly shows that the war is not only military in nature, but also ideological: it is a clash of cultures, historical narratives and civilisational values.

Argo is therefore an expression of civic responsibility, a form of cultural resistance and an important component of the national survival strategy. While active hostilities continue on the battlefield, another battle is being fought in the digital space – for our history, memory and right to our own cultural identity.

It is worth noting that a particularly important aspect of contemporary cultural heritage protection is the adaptation of proven practices used during the armed conflicts of the 20th century, which may become a topic of research in the future. The experience of World War II and other major conflicts shows that organised volunteer groups and scientists are able to respond quickly to threats, evacuate valuable collections and document destruction, thereby minimising losses for future generations.

For example, during World War II, special units called «Mona Lisa» and «Monuments Men» operated in Europe, the United States and Great Britain, evacuating and protecting cultural property

from combat zones (Saxon, & Buchanan, 2021; Larsen, & Dubina, 2023). They organised the transport of museum collections, the restoration of damaged exhibits and the systematic documentation of losses. Such practices became the basis for modern protocols for the protection of monuments in crisis situations.

In Poland, during the occupation in World War II, numerous volunteer initiatives arose to save sacred monuments and archives, with local communities transporting books and documents to safe places themselves, often risking their own lives (Lewack, 1962). This experience showed that mobilising local communities and involving a wide range of volunteers increases the effectiveness of protecting cultural values in crisis situations.

In the current context of Ukraine, these historical lessons have taken on new meaning. Volunteer and community initiatives combine evacuation and conservation methods with modern digital technologies, 3D scanning and the creation of online archives (Hromadski volonterski shtaby z poriatunku khramiv ta ikon, 2025). Drawing on historical experience allows these organisations to quickly adapt to dangerous conditions, coordinate their work effectively, engage international partners and ensure the preservation of cultural objects even in frontline regions.

Thus, the integration of proven practices from the past with modern technologies and international coordination is critical for the formation of a sustainable model for the protection of cultural heritage in times of war and other crisis situations.

Conclusion. The study included a comprehensive analysis of volunteer and community initiatives that emerged in Ukraine in response to threats to cultural heritage during the full-scale war. Based on open data, official reports from the Ministry of Culture of Ukraine, materials from UNESCO, ICCROM, ICOM, and the work of digital humanities scholars, the study examined mechanisms for the protection, documentation, and digital preservation of cultural objects. Particular attention is focused on projects such as Save Ukrainian Culture, the Centre for the Rescue of Cultural Heritage in Lviv, Saving Ukrainian Cultural Heritage Online (SUCHO), Heritage Rescue Headquarters, Backup Ukraine, and the Argo public initiative, each of which represents different models of interaction between state institutions, expert communities, and civil society.

The analysis showed that volunteer and public initiatives have not only become an operational response to the threats posed by full-scale war, but have also become a key element of a new model for preserving Ukraine's cultural heritage, based on multi-level interaction between society, state structures and international partners, forming a fundamentally different approach to the protection of cultural values in crisis conditions.

The essence of this model lies in combining the physical protection and evacuation of artefacts, carried out by volunteers, local communities, museum workers and specialised mobile groups, with international support, which includes expert assistance, material resources, advocacy of the issue at the global level and the creation of a legal basis for future restitution processes, as well as the widespread use of digital technologies that enable rapid documentation, digitisation, 3D modelling, and the creation of online archives and databases necessary for recording losses, analysing the extent of destruction, and forming a body of evidence for international judicial institutions.

The combination of these components forms an effective cultural defence toolkit that reduces the vulnerability of heritage, expands the public's opportunities in the process of monitoring and recording, and ensures the preservation of historical memory even in cases where material objects are threatened with destruction. Thus, volunteer initiatives have become not just a response to the crisis, but a driving force for the formation of a new paradigm of cultural heritage management in wartime.

It is particularly important to draw on the historical experience of volunteer initiatives implemented during the armed conflicts of the 20th century. The experience of World War II and other military conflicts has shown that organised volunteer groups, museums and researchers are able to respond quickly to threats, evacuate valuable collections and document destruction. Studying and

adapting these methods to modern conditions makes it possible to increase the effectiveness of cultural heritage protection by combining proven practices with modern technologies and international coordination.

Based on the results obtained, a number of practical measures can be proposed. It is necessary to create coordination platforms to bring together state, public and international initiatives, which will allow for a rapid response to threats to cultural heritage. It is important to develop digital infrastructure for archiving and 3D documentation of cultural objects, particularly in frontline regions. Volunteers and specialists in the field of conservation and digital preservation should also be trained, which will increase the effectiveness of their work and reduce the risk of damage to monuments. International communication and educational campaigns aimed at raising awareness of the state of Ukrainian cultural heritage and attracting resources from the international community are equally important. Finally, monitoring and scientific analysis of the effectiveness of volunteer initiatives will allow recommendations to be developed for future crisis situations in the field of cultural heritage protection.

Thus, the experience of volunteer and community initiatives during the war demonstrates that the preservation of cultural heritage is not only a material but also a moral responsibility of society. Coordinated work, a combination of technology, humanism and international cooperation, forms a model of sustainable heritage protection that can withstand the challenges of modern conflicts and serve as an example for global practice.

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NEW HUMANISM IN THE MODERN WORLD: GLOBAL CHALLENGES AND ETHICAL RESPONSIBILITY

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Abstract. The contemporary world is undergoing a profound transformation characterized by the transition from traditional forms of social organization and ideological paradigms to new global frameworks shaped by globalization, technological development, and ecological challenges. These processes have intensified ethical, social, and environmental crises, revealing the limitations of classical humanism in addressing contemporary global realities. This article examines the emergence of New Humanism as a response to these challenges, emphasizing its ethical, ecological, and social dimensions. Drawing on key philosophical contributions and international documents, the study explores New Humanism as a holistic framework that integrates human rights, sustainable development, cultural diversity, and responsibility toward future generations. The findings demonstrate that New Humanism offers not merely a theoretical alternative but a practical philosophical foundation for addressing global crises and fostering a harmonious relationship between humanity, society, and nature.

Key words: Sustainable development, planetary ethics, cultural diversity, human potential, social responsibility, global governance, holistic philosophy.

Introduction. Today, the world stands at the threshold of a transition from earlier forms of social life to a new stage, from former modes of thought and ideological paradigms to new ones. This transition can be observed in several key directions. First, development is shifting from relatively isolated national and civilizational models toward complex interactions within the framework of globalization (Solomon, 2011, pp. 21–22). Second, new reflections have emerged concerning the relationship between the world, humanity, and mortality, particularly in light of the increased potential for human self-destruction following the invention of nuclear weapons. Third, classical capitalism, having largely exhausted its internal developmental potential, is increasingly giving way to a new form of society commonly described as informational or post-industrial.

Contemporary research shows that humanism must now consider not only individual ethical behavior but also collective responsibility in a global context. Human development should be evaluated not merely by economic indicators but also in terms of real freedoms and social opportunities. Universal ethical norms can be established through communicative rationality, particularly in post-national and globalized contexts, highlighting the role of dialogue in legitimizing humanist values worldwide.

The process of globalization strengthens economic, political, and cultural integration worldwide but also generates new forms of dependency and inequality. At the same time, the unprecedented potential for destructive human activity challenges traditional ethical paradigms, creating an urgent need for a moral framework capable of responding to long-term consequences.

Post-industrial or information societies bring new social disparities and digital divides, emphasizing the importance of equitable access to knowledge, resources, and opportunities. Classical humanism, while defending human freedom, dignity, and creative potential, has been critiqued for its anthropocentric worldview, which has contributed to ecological crises and value system challenges. New Humanism responds by reimagining humans as an integral part of the biosphere, expanding ethical responsibility beyond interpersonal relations to encompass the broader environment.

Contemporary risks transcend national boundaries, necessitating collective responsibility. Globalization threatens cultural homogenization, but New Humanism provides a framework

for reconciling universal humanist principles with local cultural identities. New Humanism is positioned not as an ideology but as a practical, normative, and ethical framework that can guide human development in the 21st century. It integrates responsibility toward future generations, social justice, ecological awareness, and cultural dialogue, providing a comprehensive foundation for sustainable global development.

In my view, these transformations necessitate a fundamental rethinking of the philosophical foundations that guide human development. The growing interdependence of global systems, combined with ecological degradation and social inequality, reveals the inadequacy of purely economic or technological approaches to progress. Consequently, contemporary philosophical discourse increasingly turns toward New Humanism as a framework capable of addressing these multidimensional challenges.

Research Objectives. The objectives of this study are:

1. To examine the transformation of humanist thought from classical humanism to New Humanism in response to contemporary global challenges.
2. To analyze the ethical and ecological principles underlying New Humanism, particularly in relation to sustainable development and human rights.
3. To explore the role of New Humanism in fostering cultural diversity, social justice, and responsibility toward future generations in a globalized world.
4. To demonstrate how New Humanism can function as a holistic philosophical and methodological framework for addressing global ethical crises.

Materials and Methods. This study is based on a qualitative analysis of philosophical literature, international declarations, and key theoretical texts related to humanism, globalization, and sustainable development. The research employs comparative and interpretive methods to examine classical and contemporary humanist paradigms. In addition, analytical and hermeneutic approaches are used to interpret the ethical, social, and ecological dimensions of New Humanism as articulated in philosophical works and international policy documents.

Research findings and discussion (main text). The conference entitled *"Humanity at the Intersection of Nature and Culture,"* held in 2006 at Kruger National Park in South Africa, was part of the project *"Post-Globalization Humanism: Intercultural Dialogue on Culture, Humanity, and Values."* This initiative emphasized the necessity of developing a new type of humanism capable of addressing the challenges of globalization while encompassing cultural diversity and promoting freedom (Rüsen, 2006).

The concept of New Humanism introduces a holistic approach to human development. Within this framework, alongside the realization of individual potential, individuals are encouraged to perceive themselves as members of a unified human community, regardless of origin or gender (d'Orville, 2015). In my opinion, this shift is crucial, as it redirects ethical orientation from narrow self-interest toward collective responsibility. As Paul Kurtz emphasized, humanity bears responsibility toward future generations (Kurtz, 2000). Therefore, contemporary humanism is inseparably linked to ecological and social issues.

Sustainable development, defined as meeting present needs without compromising the ability of future generations to meet their own needs (World Commission on Environment and Development, 1987), closely aligns with the principles of New Humanism. From this perspective, sustainable development is not limited to economic growth or technological progress; rather, it represents an ethical commitment to human well-being, equality, and environmental preservation.

The foundational principles of New Humanism include care for nature, responsibility toward the future, open-mindedness, and the ethical governance of technology. New Humanism rejects anthropocentrism, viewing humanity as an integral part of nature rather than its master. It also emphasizes dialogue and tolerance while insisting that technological advancement must serve human dignity rather than undermine it.

The global project of New Humanism is closely associated with the ideas of the Club of Rome. Its founder, Aurelio Peccei, argued that global crises stem from a crisis of human personality and values. According to Peccei, the highest goal of humanity is the development of human qualities at both individual and collective levels (Peccei, 1980, pp. 197–210). He maintained that preventing global catastrophes is possible only through the effective utilization of human potential as the primary global resource (Peccei, 1980, p. 199).

New Humanism represents a distinct direction within contemporary humanist thought. Unlike transhumanism, it does not seek to replace classical humanism but to reinterpret and develop it under new historical conditions. Classical humanism has been criticized for its anthropocentric worldview, which contributed to ecological crises and moral relativism. New Humanism responds to these criticisms by integrating ethical responsibility, ecological awareness, and social justice.

At the organizational level, New Humanism has evolved into an international movement coordinated by global institutions and articulated through various manifestos. The Humanist Manifestos of 1933, 1973, and 2003 progressively expanded the scope of humanist thought, addressing issues of democracy, global unity, and individual dignity (Kurtz, 2015).

UNESCO has played a significant role in promoting New Humanism. At its 2001 High-Level Group Meeting on Peace and Dialogue Among Cultures, New Humanism was identified as an essential component of cultural diversity, technological dialogue, and global peace (UNESCO, 2001). In my view, this demonstrates the increasing recognition of humanist values as foundational principles for addressing global challenges.

One of the most compelling philosophical foundations of New Humanism can be found in contemporary theories of responsibility developed in response to global risks. Hans Jonas argues that modern technological power has fundamentally altered the scope of human action, making responsibility toward future generations a central ethical obligation (Jonas, 1984). Unlike traditional moral frameworks focused on immediate consequences, Jonas emphasizes long-term accountability for the preservation of life and the planet. This perspective strongly resonates with the ethical orientation of New Humanism, which prioritizes sustainability and precaution over short-term benefit.

Similarly, Ulrich Beck's concept of the "risk society" highlights how globalization has transformed local actions into global consequences, particularly in environmental and technological domains (Beck, 1992). In my view, New Humanism responds to this condition by proposing an ethical framework capable of addressing systemic and transboundary risks. By integrating responsibility, foresight, and collective decision-making, New Humanism offers a philosophical response to the uncertainty and vulnerability characteristic of contemporary global society.

The contemporary challenges faced by humanity extend far beyond traditional social, economic, or political frameworks. New Humanism addresses these challenges by emphasizing the interconnectedness of human, ecological, and technological systems (Nussbaum, 2011). This perspective recognizes that individual well-being is inseparable from the health of the global environment and the sustainability of social institutions. As global urbanization and technological development accelerate, the ethical responsibilities of both individuals and collectives become increasingly complex, requiring a multidimensional philosophical approach that New Humanism offers (Dryzek, 2013).

A critical dimension of this approach is the recognition of ecological interdependence. Recent studies highlight that environmental degradation and climate change disproportionately affect vulnerable populations, intensifying social inequality (Ostrom, 2010). In response, New Humanism insists that ethical considerations must incorporate ecological justice, linking human rights with environmental stewardship. This entails a shift from anthropocentric thinking toward a recognition of the intrinsic value of all living systems, promoting sustainability as an ethical imperative rather than merely a technical challenge (Leopold, 1949; Gardiner, 2011).

Furthermore, New Humanism integrates the ethics of technological development, asserting that scientific progress must enhance, not compromise, human dignity. For example, emerging artificial intelligence and biotechnology present unprecedented opportunities but also novel ethical dilemmas, such as algorithmic bias, surveillance, and genetic engineering (Bostrom & Yudkowsky, 2014). By applying ethical foresight, New Humanism proposes guidelines to balance innovation with responsibility, ensuring that technological growth does not exacerbate social inequities or environmental harm (Floridi, 2013).

Another significant area of expansion is global cultural dialogue and pluralism. As international communication and migration increase, societies face challenges in reconciling diverse cultural traditions with universal humanist values. New Humanism provides a framework for intercultural dialogue that respects local identities while promoting shared ethical standards, fostering peace, and mitigating conflicts arising from cultural misunderstandings (Appiah, 2006). This global dimension emphasizes collective responsibility, demonstrating that moral duties extend beyond national or cultural boundaries.

In addition, New Humanism emphasizes intergenerational responsibility. Drawing upon concepts from environmental ethics and risk society theory, it argues that current decisions have far-reaching consequences for future generations (Meadows et al., 2004). This approach promotes policies and practices that ensure sustainability in education, resource management, and social governance, aligning economic development with ecological and social responsibility. It reinforces the notion that ethical frameworks must be anticipatory, not reactive, embedding precaution as a central moral principle.

Moreover, social justice is deeply interwoven into New Humanism's philosophy. The framework highlights structural inequities within societies and at a global scale, calling for equitable access to resources, education, and political participation (Sen, 2009). By linking social justice with ecological sustainability and technological ethics, New Humanism establishes a holistic normative system capable of addressing the multidimensional challenges of globalization.

Finally, New Humanism offers a pragmatic operationalization for global governance and policy-making. Through international collaboration, inclusive institutions, and the promotion of universal human rights, this framework guides decision-makers in balancing competing interests, fostering global solidarity, and anticipating systemic risks (Held, 2010; Pogge, 2008). By combining ethical theory with actionable strategies, New Humanism moves from abstract philosophical discourse to practical application, demonstrating its relevance in addressing contemporary global crises.

In summary, these new dimensions—ecological interdependence, technological ethics, intercultural dialogue, intergenerational responsibility, and social justice—reinforce New Humanism's comprehensive approach to global ethical challenges. This framework transcends conventional humanist thought by integrating ethical, environmental, social, and technological considerations into a cohesive system, providing actionable guidance for both individuals and institutions navigating the complexities of the 21st century.

Conclusion. The analysis demonstrates that New Humanism constitutes a comprehensive philosophical response to the ethical, ecological, and social challenges of globalization. It integrates universal human values, human rights, and the ideal of a harmoniously developed personality while rejecting both anthropocentrism and value relativism. New Humanism emphasizes responsibility toward future generations, ecological sustainability, and global solidarity.

In conclusion, New Humanism should be understood not as an abstract ideology but as a practical ethical framework capable of guiding contemporary social development. By prioritizing human dignity, cultural diversity, and ecological responsibility, New Humanism offers a viable foundation for sustainable global development and the prevention of future global crises.

Furthermore, the significance of New Humanism extends beyond ethical and ecological considerations to the guidance of global governance and policy-making processes. The complex risks and

transboundary challenges arising from globalization demonstrate that traditional state and institutional approaches are often insufficient. In this context, New Humanism offers a holistic and integrative approach, combining social justice, ecological sustainability, and ethical principles into a single framework.

At the same time, New Humanism emphasizes the importance of intercultural understanding and dialogue. In a global environment where misunderstandings between cultures and social groups are increasing, dialogue based on humanist values not only prevents conflicts but also strengthens global solidarity. This approach highlights that ethical principles should not remain at the theoretical level alone but must be applied in practical policy and cultural initiatives.

In the context of technological developments, New Humanism proposes a model of forward-looking and ethical governance. Emerging fields such as artificial intelligence, biotechnology, and other innovative technologies must be regulated according to principles that safeguard human dignity and social equality. By doing so, New Humanism reduces global technological risks while reinforcing responsibility toward future generations.

New Humanism also emphasizes intergenerational and long-term responsibility. In contemporary society, short-term profit and economic goals often exacerbate ecological and social problems. From this perspective, New Humanism provides an ethical foundation for sustainable policies and global decision-making processes.

Consequently, New Humanism is not merely a theoretical approach but a practical and normative framework. It enables states, international organizations, and individuals to manage global crises while maintaining ethical, social, and ecological balance. This framework also protects human dignity, promotes cultural diversity, and seeks to create a more sustainable world for future generations.

Thus, New Humanism functions not only as a philosophical and ethical concept in the modern world but also as a practical and applicable framework, offering guidance for building a sustainable, just, and ecologically balanced future for humanity.

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TAK SABIR AS A UNIQUE VOICE IN AZERBAIJANI SATIRICAL PRESS

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Abstract. The history of the development of Azerbaijani satirical press occupies a special place both in the enrichment of national journalism in terms of form and content and in the process of raising the level of public consciousness. In the late nineteenth and early twentieth centuries, the satirical tradition established by Mirza Alakbar Sabir created a significant turning point not only in poetry but also in the overall intellectual framework of national journalism. Sabir's sharp spirit of social criticism, his exposure of societal flaws through irony, and his reflection of enlightenment ideas in journalistic texts laid an ideological and stylistic foundation for subsequent examples of satirical press. In his poetry, he reinterpreted the confrontation between good and evil, benefit and harm, bravery and cowardice, light and darkness, life and death in a new way–particularly through antagonisms such as those between worker and capitalist, peasant and landlord, subject and ruler, and ideological divisions

Key words: Azerbaijani satirical press, Tak Sabir, Mirza Alakbar Sabir, social criticism, satire and journalism, public consciousness.

Intoduction. In the history of Azerbaijani journalism, satirical publications have played a crucial role in shaping public consciousness. Although this tradition was initiated in the early twentieth century by the magazine Molla Nasreddin, satirical press later experienced periods of decline and marginalization due to political processes. However, the socio-political transformations of the late twentieth century–such as the collapse of Soviet censorship, the strengthening of national self-awareness, and the growing need for public criticism–created fertile ground for the revival of satirical press traditions in Azerbaijan. Under these conditions, the emergence of a new satirical newspaper became inevitable, and the name "Tak Sabir" has its own noteworthy history.

Discussion. In 1992, the Shirvan Charity Society was established, and upon the proposal of its newly elected chairman, Iskandar Etibar, the publication of the society's own press organ–a newspaper–was planned. Considering the difficulty of selecting an appropriate title, the members of the society entrusted this responsible task to Etibar; however, they did not agree with the name "Hophop" that he initially proposed. Deeply influenced by the spirit of Sabir reflected in his poetry, Etibar once again turned to Sabir's literary legacy and, inspired by the poem "Tak Sabir," which had been published in the journal Molla Nasreddin and had gained wide popularity among the public both for its content and impact, proposed naming the newspaper "Tak Sabir." Despite certain objections, the majority ultimately acknowledged that this title was a successful and meaningful choice for a newspaper intended to embody the spirit of Sabir and the genius of Mirza Jalil, and the publication subsequently commenced its activities. However, gathering poets and authors capable of producing engaging articles and poems under the slogans "Healthy Satire" and "Healthy Criticism" around this newly established, satire-driven newspaper proved to be far from easy.

The socio-political realities of the period played a decisive role in shaping the thematic direction of the newspaper. The late 1990s and early 2000s represented a phase of considerable economic hardship and social instability in Azerbaijan. Although the press of this period developed along vari-

ous lines, a noticeable void existed in the field of satire. The newspaper Tak Sabir filled this gap and became a principal platform for the satirical analysis of everyday problems. In particular, issues such as the growing influence of external forces, the influx of foreign labor, and the erosion of national values became regular objects of criticism in the newspaper.

One of the key features that distinguished Tak Sabir from other contemporary press organs was the abundance of authorial signatures and the distinctive character of these pseudonyms. The diversity of authors appearing under various names on the pages of the newspaper testified to the existence of a broad and creative collective composed of professional writers, educators, and individuals with a satirical mindset. These pseudonyms were not merely intended to conceal authorial identity; rather, they expanded the expressive possibilities of satire, enabled more comprehensive portrayals of social types, and contributed to the creation of memorable characters in the readers' minds. Signatures such as "Faqir," "Uzugyola," "Pinti," and "Sarımsaq" evolved into satirical symbols of specific social strata and character types, thereby enriching the artistic expressiveness of the texts. The authors of the newspaper, writing under various pseudonyms, successfully conveyed ironic, sarcastic, humorous, and black-humor elements of satire to readers through dialogic forms. Among the frequently encountered signatures in the publication were "Sarımsaq," presented as a rural correspondent; "Cırcırama," identified as a cousin; "Cüt Sabir," the brother-in-law; "Lal-kar," another in-law; "Uzugyola," the Lankaran correspondent; "Faqir," introduced as a correspondent "from the moon"; as well as "Qəmbiçən" and "Beçə," depicted as collectors of village news. In addition, pen names such as "Tak Sabir"–portrayed as the grandson of Molla Nasreddin–along with "Pinti," "Mir Sabir," "Yetim," "Siyasətbaz," "İşsiz," "Kəlləgöz," "Yadigar Mikayiloglu," "Ümid," and "Minnətçi Tak Sabir" occupied a significant place in the newspaper. This wide variety of authorial signatures strengthened the atmosphere of collective creativity within the publication, expanded the stylistic possibilities of satire, and enabled social problems to be presented from multiple perspectives.

Tak Sabir was not merely a publication that printed satirical texts; rather, it functioned as a press organ that articulated positions on society's social and moral problems and served as a tribune that stimulated the activation of public consciousness. The founder and editor-in-chief of the newspaper, Iskandar Etibar, devoted many years of his artistic, journalistic, and organizational activity to the development of this publication. Despite working in various fields, he preserved his strong commitment to satire and consistently sustained the newspaper's social mission. His personal initiative, social sensitivity, and loyalty to Sabir's literary legacy constituted some of the decisive factors in the emergence and formation of Tak Sabir. As Ilgar Fahmi notes, whereas the objects of criticism in the journal Kirpi were primarily negative character types belonging to the lower strata of society, Tak Sabir openly and explicitly criticized the country's most prominent political figures and state officials of the time, sharply exposing shortcomings in their activities (Fahmi, 2012, p. 8) .

In Iskandar Etibar's creative work, satire is intertwined with such concepts as "love for the people, a sense of responsibility for their future, and the struggle for freedom" (Maharramova, 1976, p. 39)As a result, satire becomes not only a means of targeting negative social and бытовые (everyday) types but also a tool for exposing contradictions in the behavior and activities of high-ranking political figures. Unable to remain indifferent to injustice and unfairness in life, the poet reflects these phenomena figuratively in both his literary works and journalistic articles, thereby directing society's attention to the issues raised (Xilali, 2013, p. 12). This conceptual stance played a significant role in determining the developmental directions of twentieth-century Azerbaijani satirical poetry. Iskandar Etibar's satirical worldview is grounded in a profound understanding of social processes and performs the function of an "unbreakable mirror," reflecting societal realities with unwavering clarity.

Historically, Azerbaijani satirical press has been characterized by its mission of social criticism and enlightenment. While Sabir's satire foregrounded issues such as the people's lack of education, social injustice, bureaucratic arbitrariness, social stratification, and problems of national identity, the news-

paper Tak Sabir continued these ideas through modern approaches within the new socio-political conditions that emerged in the late twentieth century. As noted, "it is as if the problems identified by Sabir remained the same at the end of the twentieth century, albeit having undergone certain formal transformations" (Aghabay, 2022 p.54). Indeed, issues such as corruption, social inequality, the growing influence of external forces, and the weakening of national and moral values were extensively reflected in the newspaper's satirical and journalistic texts. In addressing these themes, Tak Sabir revitalized the sharp critical spirit of Sabir's satire within a new historical context, successfully integrating the classical tradition with contemporary social realities.

The ideological sources of Tak Sabir's satirical line were not limited solely to Sabir's poetry. The newspaper possessed a broad conceptual foundation nourished by the social memory of the Azerbaijani people, the public anxieties of the transitional period, and society's pursuit of justice. Regardless of circulation figures and financial difficulties, the newspaper consistently maintained critical engagement with social problems in its pages. During this period, "in the struggle against social calamities, deformities that hinder social progress, oppression, torture, ignorance, superstition, national and religious discrimination, and political deprivation, the role of the writer's word and pen increased enormously" (Rustamkhanli, 2024, p 39). Bureaucratic arbitrariness, bribery, and other pressing issues were presented to readers through satirical poems and feuilletons. This approach echoed Sabir's principle of "seeking the causes of national decline within the nation itself," which also served as a central guiding direction in Tak Sabir. One of the most serious challenges faced by the newspaper during its formative stage was financial difficulty. The economic crisis of the 1990s had a direct impact on the functioning of press institutions, leading to a decline in newspaper circulation. Tak Sabir was not immune to these challenges; in many instances, decreasing circulation figures, rising printing costs, and the near absence of an advertising market significantly constrained the activities of the editorial board. Nevertheless, rather than suspending publication, the newspaper adopted innovative content strategies aimed at sustaining reader interest. From 1999 onward, as authorial activity declined to some extent, the editorial team introduced various format innovations to prevent the newspaper from appearing with empty pages. These innovations included the publication of weekly television program schedules, crosswords, test questions, and humorous knowledge competitions. Although such content diversification might appear as a departure from the satirical line, it was, in fact, a creative survival strategy that enabled the newspaper to endure under prevailing conditions. Consequently, Tak Sabir evolved from being solely a satirical publication into a broader educational and entertainment-oriented press organ.

The satirical orientation of Tak Sabir directly influenced its thematic choices, resulting in extensive coverage of social and moral issues encompassing nearly all spheres of society. A defining characteristic of the thematic structure of the published texts lies in the fact that criticism is not limited to the functional shortcomings of everyday life; rather, the psychological and ideological roots of these deficiencies are also revealed through artistic and journalistic interpretation. Satire, in this context, functions not merely as a means of eliciting laughter, but as a mechanism that encourages society toward self-criticism. Each ironic detail becomes a clear exposure of prevailing social behavior patterns.

Among the central themes addressed by the newspaper were problems within the system of governance. The publication frequently transformed the cumbersome mechanisms of bureaucracy, administrative arbitrariness, and irresponsible attitudes toward citizens into objects of satire. The bureaucratic figure depicted in Tak Sabir represents a modern transformation of a type well known from classical Azerbaijani satire: an individual who exploits official authority for personal interests, ignores societal problems, and trivializes citizens' concerns. Notably, however, Tak Sabir approached this figure not solely through sharp irony but also through analytical examination as a social type, revealing the underlying causes of bureaucratic behavior–such as systemic irresponsibility, societal habituation to such conduct, the weakness of legal mechanisms, and related issues.

This approach elevates the function of satire beyond merely pointing out flaws, advancing it toward a structural analysis of the problem itself.

Tak Sabir also extensively addresses issues of social injustice. Problems such as economic hardship, unemployment, regional disparities in development, and the weakness of the social welfare system are examined through a satirical lens. The newspaper approaches these issues not merely as empirical facts, but also as manifestations of an ideological malaise. The immersion of society in individual concerns, the erosion of the concept of collective well-being, and the emergence of an atmosphere of distrust in social relations are depicted on a broad scale. In the satirical materials of the newspaper, social stratification is frequently presented against a backdrop of tension created by ironic contrasts. On the one hand, a wealthy social stratum living in luxury and detached from social responsibility is portrayed; on the other hand, ordinary people struggling with everyday difficulties are depicted. Through this juxtaposition, satire vividly exposes the magnitude of both economic and moral divides.

Among the themes addressed by the newspaper, the erosion of national and moral values occupies a particularly prominent place. Processes such as the acceleration of modern lifestyles, the influence of globalization, and the uncritical adoption of foreign cultural patterns undermine the traditional value system of society, and these developments are presented in the newspaper through sharp satirical expression. In the writings of Iskandar Etibar and his colleagues, issues such as alienation from one's identity, the weakening of national character, and the commodification of values are conveyed at times through caricature and at other times through poetic irony. The aim of addressing these topics was not solely to criticize, but also to encourage readers to reflect. The satire of Tak Sabir thus fulfilled the function of guiding individuals back to self-awareness and confronting them with the realities of an identity crisis.

Another direction of Tak Sabir's satirical line focuses on themes related to the intelligentsia. Here, the object of criticism is not the uneducated masses, but rather the intellectual class that is expected to understand the spirit of the time and provide guidance to society. The silence of intellectuals, their indifference to social processes, their preoccupation with personal comfort, and their reluctance to contribute their voices to societal problems become targets of satire. In the modern era, satire no longer targets ignorance itself, but rather those who, despite being educated, fail to demonstrate social responsibility. This is particularly significant given that the period in question was "an era that produced novels, dramas, tragedies, and epochs every minute" (Rustamkhanli, 2024, p. 39), a context in which the silence of intellectuals demands especially sharp exposure.

One of the defining characteristics of Tak Sabir's thematic line is its satirical exploration of seemingly minor aspects of everyday life that are nevertheless significant from the perspective of social psychology. The newspaper frequently depicts issues such as behavioral stereotypes, ordinary domestic habits, violations of norms of public etiquette, and the general weakening of the ethical environment. Although these issues may appear trivial at first glance, they are rooted in deeper moral problems. Phenomena such as the loss of individual responsibility toward oneself and others, the construction of social relations on indifference, and the deterioration of behavioral culture in public spaces are critically examined and satirized within the newspaper.

All of these themes collectively define the newspaper's function of social criticism. Satire is employed not merely to provoke laughter, but also to shake society, to challenge prevailing behavioral models, and to reveal the essence of social problems. Tak Sabir fulfills this function through literary language, caricature, and various satirical formats, thereby transforming itself into a mirror of social processes. Over time, the satirical essence of the newspaper became increasingly sharp, positioning it as an important cultural institution that fostered self-critical thinking among different segments of society.

The satirical world of Tak Sabir constitutes an original literary environment shaped not only by its choice of themes, but also by the multilayered nature of its modes of expression. The newspaper's

style represents a synthesis of diverse artistic components, vivid elements of folk speech, the classical model of satire, and methods of modern psychological analysis. This synthesis manifests itself at times in verse, at times in prose, and at other times in the language of caricature and the feuilleton. The stylistic diversity of the newspaper is not merely an aesthetic choice; rather, it serves to enhance the impact of satire, stimulate the reader's critical thinking, and strengthen a sense of social responsibility.

At first glance, the language of the newspaper Tak Sabir appears simple; however, behind this apparent simplicity lie both keen observation and a distinctive rhythm. The texts employ everyday spoken language with such mastery that the words sound familiar to the reader, while the ideas create the impression of being drawn directly from lived experience. The construction of the articles through short and concise sentences generates a particular dynamism within the satirical tone, allowing the essence of events to become clear even with minimal wording. Expressive devices such as irony, exaggeration, and sarcasm are organically integrated into the text, prompting the reader to laugh momentarily and then reflect more deeply. At times, the newspaper's language unfolds in the form of dialogue, at other times as parody, a strategy that both animates social relations and infuses the writing with artistic vitality. It is precisely through this linguistic approach that Tak Sabir establishes closeness with its readership. The newspaper neither speaks from a detached distance nor relies on heavy theoretical frameworks; instead, it conveys what it sees and feels in a tone drawn directly from everyday life.

One of the stages in the newspaper's development involved its transition related to the alphabet reform. Although the adoption of the Latin-based alphabet was officially approved in Azerbaijan in 1991, texts written in the Cyrillic script continued to appear in the press for a considerable period. This situation was linked to printing capacities, technical equipment, and readers' adaptation to the new alphabet. The use of Cyrillic script in some issues of Tak Sabir reflects the press realities of that historical period. This phenomenon can be analyzed within the context of transitional language policy and is regarded as one of the newspaper's efforts to adapt to new conditions while preserving its literary and artistic continuity.

Until 2002, the newspaper was published with a weekly circulation of five thousand copies; however, due to the sensitive nature of the issues it addressed, the occasional public exposure of certain individuals, and the influence of biased forces, it no longer sold as widely as before. Despite health problems, Iskandar Etibar continued from time to time to ensure that Tak Sabir maintained its connection with readers. In February 2014, in what was the first issue of that year and the 233rd issue overall, the newspaper bade farewell to its audience with the following lines:"Even if the heart is full and the mind is active, When the pocket is empty, who needs such a person's words?" (Tak Sabir. 2014, Issue No. 233, p. 16).

Alongside the continuation of Sabir's poetic tradition, a critical perspective addressing the new problems of the independence period also took shape within the satirical line of the newspaper. From this perspective, Tak Sabir was not merely a collection of satirical texts, but a press experience that played a role in processes of national self-awareness, social reflection, and the renewal of public thought.

The newspaper Tak Sabir can be regarded as a unique voice within Azerbaijani satirical press, distinguished both functionally and aesthetically, as well as ideologically. Its activity represents a significant example of sustaining Sabir's legacy in a modern context, fostering dialogue between satire and society, and ensuring the continuity of national press traditions.

Sabir's poetic language and satirical style occupy a special place in Azerbaijani literature, and it is possible to observe the modern manifestation of this tradition in Tak Sabir. Scholarly works such as Azal Demirchizade's The Technique of Sabir's Satire (Demirchizade,1962, p3), Musa Adilov's article Some Notes on the Language and Stylistic Features of M. A. Sabir. (Demirchizade, 1962 , p 152), and Rahila Maharramova's monographs The Language of Sabir (Maharramova, 1976, p 110). and The Lexicon of Sabir's Satirical Poems (Maharramova,1968, p 142) systematically examine Sabir's

linguistic and stylistic characteristics, revealing the impact of his satirical techniques, lexical choices, and poetic devices. Tak Sabir, however, transmits this classical heritage to the contemporary reader not only on a poetic level, but also across ideological, social, and psychological dimensions. The newspaper's language preserves the natural flow of folk speech, enhances the energy of satire through short and rhythmic sentences, and engages readers in both laughter and reflection through irony, sarcasm, and hyperbole. In this context, Sabir's influence is unmistakable: he "became the visible eye and the speaking tongue of the people, flowed into hearts through his pungent speech, took root in hearts, and illuminated minds. Even though he did not regard the world as a joke, he spoke with great seriousness by turning it into one" (Zeynalova, 2019 p. 24). Tak Sabir continues precisely this tradition, conveying what Sabir once perceived through words by means of modern textual forms, visual elements, and stylistic diversity, thereby enabling classical satire to survive and renew itself in the contemporary era.

Alongside satirical texts, the newspaper also featured caricatures that complemented and reinforced the written content. The cartoonists emphasized that, through their drawings, they demonstrated a level of courage no less than that of Iskandar Etibar himself. According to Etibar, "satire and caricature are not directed at the leader in such a way that he would fear them and attempt to suppress this field. Since satire is humanistic in nature, every leader, in the name of humanity, should be tolerant of criticism directed at himself and should treat the author with respect; the more this field of literature develops, the more easily the country can be governed" (Etibar, 2005, p. 7).

The caricatures drawn by chief artist Gunduz Alizade exposed bureaucratic arbitrariness, social injustice, and moral degradation through visual metaphors, transforming the newspaper into not merely a publication but also an aesthetic school. The parallel use of caricatures and satirical writings enhanced the newspaper's artistic and journalistic value and significantly increased its social impact.

Conclusion. An analysis of the textual production, tone, and intellectual atmosphere created by Tak Sabir over many years makes it evident that this newspaper did not emerge solely out of a need for satirical expression. Rather, it became the press embodiment of an inner voice that people carried within themselves–an unease that society was unable to articulate openly, yet continuously experienced. For this reason, examining Tak Sabir solely through literary categories is insufficient. The newspaper was simultaneously a literary phenomenon, a form of social reaction, and a component of the emotional dialogue between individuals and their historical moment.

Our research demonstrates that Tak Sabir, while serving as a modern continuation of Sabir's satire, also functioned as a platform that reinterpreted this tradition within new historical circumstances and infused it with renewed vitality. The newspaper applied the humanistic essence underlying Sabir's critical laughter–its power to awaken individuals, compel reflection, and confront errors–to the harsh social realities of the independence period. This endeavor required both loyalty to literary heritage and the courage to renew it.

Although the authors of Tak Sabir wrote under various pseudonyms, a shared sentiment permeated their works–one that can be described as a form of concerned or restless affection. This was not indifference toward society, but rather an expression of care aimed at its improvement, the purification of its thought, and the strengthening of its values. Such an approach represents one of the most demanding and elevated functions of satire: preserving love within criticism. Tak Sabir succeeded in this regard and thus evolved into not merely a satirical newspaper, but a school of humanity.

The combined effect created by caricatures and satirical texts enabled the newspaper to reach a broader audience on both emotional and aesthetic levels. A single line, an image, or a moment of laughter could sometimes resonate more quickly and more deeply than an article of hundreds of sentences. This demonstrates that Tak Sabir shaped satire not only as an instrument of intellectual criticism, but also as a mechanism of emotional engagement and influence.

The closure of the newspaper due to financial reasons did not bring an end to its moral function. On the contrary, the satirical tradition it established, the value it placed on the written word, and the

mirror it held up to society remain relevant today. One of humanity's enduring needs is self-recognition–sometimes pleasant, sometimes painful, sometimes ironic. Tak Sabir fulfilled this need and entered the history of journalism as one of the rare voices capable of doing so.

What made Tak Sabir unique was not solely its satirical style; rather, its distinctiveness lay in its ability to bring satire closer to the individual, to imbue criticism with humanistic meaning, and to transform laughter into a means of moral education. This newspaper constitutes a valuable cultural memory for literary space, social thought, and self-perception alike. By building a bridge between criticism and laughter, this memory both elucidates a historical period and reminds humanity of its perpetual need for change.

The scholarly examination of Tak Sabir as a unique voice in Azerbaijani satirical press not only reveals how classical satirical traditions have been sustained in a modern context, but also represents a timely academic issue in terms of systematically evaluating the development of public-critical thought during the independence period. From this perspective, the present article may be regarded as one of the first studies dedicated to a comprehensive analysis of the Tak Sabir newspaper within both scholarly and journalistic frameworks.

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DOUBLE CODING OF PILGRIMAGE AS A SOCIAL AND COMMUNICATION INSTITUTION IN THE CONTEXT OF MEDIATIZATION

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Abstract. In modern society, pilgrimage increasingly appears not only as a form of religious practice, but also as a social and communication institution, formed under the influence of mediatization processes (Panchenko & Rizun, 2025a). In this context, pilgrimage functions as a structured system of production, transmission and interpretation of meanings, which at the same time operates at the institutional and interpretive levels (Baggio, 2005; Butler, Suntikul, 2018). The aim of the article is to conceptualize pilgrimage through the prism of the concept of double coding, which allows us to capture the interaction between the explicit institutional-ritual code and the implicit interpretive-narrative code.

The research is based on a social and communication approach, focused on the analysis of communicative practices, media representations and the circulation of pilgrimage narratives beyond the theological understanding of pilgrimage (Jirásek, 2011; Rizun, 2022; Ivanov, 2003; Kornieiev, 2016). The theoretical basis is classical pilgrimage studies and modern theories of mediatization and mediated communication. An illustrative case is the international Dual Pilgrim Program, which combines the Japanese Kumano Kodo route and the European Camino de Santiago (Ito et al., 2025; de Sousa & da Rosa, 2020). The analysis of this case demonstrates how formalized institutional mechanisms of pilgrimage recognition (routes, pilgrim ID, stamps) are combined with processes of individual meaning-making, narrative integration, and mediatized representation of personal spiritual experience (Are you a «Dual Pilgrim?»; Couldry & Hepp, 2017).

As a result, it is proven that mediatization does not create a separate semantic level of pilgrimage, but rather enhances the interaction between explicit and implicit codes, creating conditions for interpretive drift and transformation of sacred meanings in the public social space (Lundby, 2014; Schulz, 2004). The concept of double coding allows us to consider pilgrimage as a dynamic communicative structure, where institutional stability is combined with openness to interpretive transformations, while ensuring the heredity and adaptability of pilgrimage practices in modern sociocultural conditions (Coleman & Eade, 2004; Couldry, 2012).

Key words: pilgrimage, social and communication institution, double coding, mediatization, interpretive drift, Dual Pilgrim Program.

Introduction. Pilgrimage as a social and communication institution functions not only as a form of religious practice, but also as a stable system of production, transmission, and interpretation of meanings in the social and communication space (Turner & Turner, 1978; Eade & Sallnow, 1991). In this context, the application of the concept of double coding allows us to analytically capture the structural feature of pilgrimage - the simultaneous presence of two interconnected, but not identical, semantic levels (Rettberg, 2017; Turner, 1969).

The first level is an explicit, institutionalized code that includes the physical route, ritual acts, sacred objects, normative practices, and established forms of communication between pilgrims. This code is socially regulated and is subject to reproduction within the framework of tradition and institutional memory (Turner, 1969; Rinschede, 1992).

The second level represents the implicit, interpretive code that is formed through personal spiritual experience, symbolic understanding of the path, individual narratives and media representations of pilgrimage. It is at this level that meaning-making takes place, which cannot be fully formalized, but actively circulates in social space through narratives, visual images, digital media and storytelling (Eade & Sallnow, 1991; Couldry, 2012; Rahimi & Amin, 2020). Within this process, we can speak of interpretive drift − a gradual change and rethinking of sacred meanings under the influence of accumulated experience and new narrative-media frameworks, which does not destroy the ritual basis of pilgrimage, but adapts it to modern socio-cultural conditions (Johannsen & Ohrvik, 2020: 520; Eade & Sallnow, 1991).

Main part. In the current mediatization of pilgrimage, double coding acquires a special emphasis**.** The media do not create a separate «third code», but act as a mechanism for broadcasting and reinforcing the implicit level, translating personal sacred experience into a form of public communication (Hjarvard, 2013; Hepp, 2020). Photographs of shrines, video diaries and posts on social networks function as explicit signs that simultaneously activate hidden meanings related to faith, identity and collective memory (Couldry & Hepp, 2017; Goffman, 1978).

Precisely in this process of media circulation interpretive drift is formed, in which the meanings of the ritual are gradually reinterpreted through narratives and visual representations, without violating the institutional heredity of pilgrimage practices (de Sousa & da Rosa, 2020: 6). Thus, the double coding of pilgrimage within the social and communication approach appears not as a quantitative layering of meanings, but as a binary structure of communication in which the institutionally given code and the mediatized interpretive code are in constant interaction (Rizun, 2022; Van Leeuwen, 2025; Couldry, 2012). Exactly this interaction ensures the stability of pilgrimage as a social and communication institution and, at the same time, openness to interpretive drift and socio-cultural transformations (Afonina, 2018; Panchenko & Rizun, 2024).

An example of institutionalized double coding of pilgrimage is the «Dual Pilgrim Program», which combines the Japanese Kumano Kodo route and the European Camino de Santiago. The use of a single pilgrim credential at two UNESCO World Heritage sites involves the collection of stamps that serve as explicit institutional markers of route completion, recognition, and legitimization of pilgrim status (Sanchez Amboage, Ludeña Reyes & Viñán Merecí, 2017).

At the same time, the common passport activates an implicit interpretive level that ensures the narrative integration of culturally different sacred journeys into a single personal experience of the pilgrim. In this sense, the «Dual Pilgrim» functions as a communicative medium that simultaneously stabilizes the institutional meaning of pilgrimage and creates conditions for interpretive drift in transnational pilgrimage practices (Kumano Travel; Camino de Santiago Office) (Wu H. C. et al., 2019; Hussain, T., Wang, D., 2024).

The «Dual Pilgrim Code» presents the «Dual Pilgrim Program» (Kumano Kodo + Camino de Santiago) – a special form of recognition for individuals who have done both pilgrimage routes: the ancient Japanese Kumano Kodo and the European Camino de Santiago (Way of St. James), using a single pilgrim credential for both routes (Kato & Progano, 2017; Amaro et al., 2018). The program marks these two routes, which are included in the UNESCO World Heritage List (Afonina, 2018; de Sousa & da Rosa, 2020).

Pilgrims collect stamps on both sides of the certificate, one for each route, and receive a final stamp at designated centers in Spain (Santiago de Compostela) or Japan (Kumano), which certifies the acquisition of «Dual Pilgrim» status (Are you a «Dual Pilgrim?»; Johannsen, Ohrvik, 2020).

Let's consider the main components of the program:

Routes. The Japanese Kumano Kodo route, which is covered on foot, and the Spanish Camino de Santiago, which can be covered on foot, by bike or on horseback.

Pilgrim's credential. A special passport with two sides - separately for each route, in which stamps are collected at temples, shrines, churches and information centers.

Algorithm for participating in the program:

Start. Obtaining a Dual Pilgrim certificate at tourist centers, in particular at the Tanabe Information Center in Japan, or through a tour operator.

Passing and collecting stamps. Collecting stamps on the corresponding side of the certificate while completing each route.

Completion. After completing both routes, the certificate with the collected stamps is submitted to the corresponding registration center to obtain a special final Dual Pilgrim stamp.

The Dual Pilgrim Program is **the only known example** where all these elements are present simultaneously:

1. Two different pilgrimage routes – different cultural, religious and civilizational contexts (Japan / Europe);
2. A single pilgrim credential – one document for two paths;
3. Formalized institutional recognition – final registration and official Dual Pilgrim status;
4. Support from official institutions – tourist offices, international centers, UNESCO context (Dual Pilgrim – Tanabe City Kumano Tourism Bureau).

Fig. 1. Official logo of the Dual Pilgrim Program
URL: https://dual-pilgrim.spiritual-pilgrimages.com/are-you-a-dual-pilgrim/

The Dual Pilgrim logo combines two culturally distinct symbols of pilgrimage: the shell, a classic symbol of the European Camino de Santiago, which serves as a landmark and a symbol of pilgrim identity, and the Yatagarasu crow, mythologically associated with guidance and spiritual accompaniment in Japanese tradition, particularly on the Kumano Kodo route. This combination of emblems represents the communicative logic of dual coding, where a single visual sign unites institutional and culturally conditioned meanings (The pilgrimage creates bonds; Paschinger, 2019).

Methods of research. The research is based on a social and communication approach, within which pilgrimage is considered as a social institution that functions through stable and variable communicative practices aimed at the symbolic production, translation and interpretation of sacred meanings. In this context, attention is focused not on the theological aspects of pilgrimage, but on the forms of social communication that structure the pilgrimage experience in public and mediated social space (Eade & Sallnow, 1991; Couldry, 2012). The social and communication approach in the research performs a framework function, allowing us to conceptualize pilgrimage as an institutionalized system of meaning circulation (Couldry, 2007; Couldry, 2012; Ivanov, 2003; Kornieiev, 2016).

Methodologically, the study combines an interpretive approach with a social and communication analysis of pilgrimage narratives, visual representations, and media practices (Havrylets & Rizun, 2024). The interpretive approach is used to analyze the processes of meaning-making and interpretive drift within the implicit code of the pilgrimage experience. The social and communication analysis of media practices allows us to consider communication technologies not as an external factor, but as an element of the communicative infrastructure of the social and communication institution (Polus & Carr, 2021; Rettberg, 2017).

For the analytical interpretation of the material, the concept of double coding is used as a theoretical and analytical tool, which allows us to capture the interaction of the institutionally given explicit code and the implicit interpretive code, which is formed in the process of social communication and mediatized circulation of pilgrimage narratives (Hall, 1980; Couldry & Hepp, 2017). Digital tools based on artificial intelligence (in particular ChatGPT) were used as an auxiliary tool for structuring and clarifying the theoretical material (OpenAI, 2023; Zhou et al., 2023).

Results and Discussions. Dual Pilgrim status is granted to pilgrims who have completed both the Japanese Kumano Kodo and the European Camino de Santiago routes, in accordance with formalized requirements established by the program organizers. These requirements function as an explicit institutional code that regulates the recognition of the pilgrimage experience and provides its symbolic legitimation.

The Camino de Santiago route requires at least the last 100 km to be walked or on horseback, or at least 200 km to be cycled. In the case of the Kumano Kodo route, the institutional criteria require that one of the designated walking sections be completed (in particular, from Takijiri-oji to Kumano Hongu Taisho; from Kumano Nachi Taisho to or from Kumano Hongu Taisho; from Hoshinmon-oji to Kumano Hongu Taisho with a mandatory visit to the Kumano Hayatama Taisho and Kumano Nachi Taisho shrines; or from Koyasan to Kumano Hongu Taisho). It is important that within the Kumano Kodo, only walking is permitted, which emphasizes the ritual-physical nature of this pilgrimage route (Serrallonga, 2018; Van Leeuwen, 2025).

The completion of each route is recorded through an official completion stamp, which acts as a material communicative marker. For the Camino de Santiago, such a stamp is issued at the pilgrims' office near the cathedral in Santiago de Compostela, while for the Kumano Kodo, it is issued at a specially designated point near the main shrine of Kumano Hongu Taisho (Amaro et al., 2018).

After completing both routes, the pilgrim contacts one of the program's information centers to receive a double stamp of completion, which certifies the integration of two autonomous pilgrimage experiences into a single institutional status of Dual Pilgrim. In the socio-communicative dimension, this stamp acts as an explicit sign of legitimation, which simultaneously activates implicit narratives of personal spiritual journey and transnational pilgrim identity (Are you a «Dual Pilgrim?»; Shmueli & Collins Kreiner, 2018).

The interaction of explicit and implicit codes forms a zone of interpretive drift in which the processes of semiotic layering of meanings and mediatization of pilgrimage occur (Panchenko & Rizun, 2025b). It is right in this zone that institutionally assigned sacred signs acquire new meanings through personal narratives, visual representations, and digital storytelling, simultaneously ensuring both the reproduction and transformation of the sacred in social space (Johannsen & Ohrvik, 2020, p. 520; de Sousa & da Rosa, 2020, p. 6).

In today's digital mediatization environment, an additional tool to support this interpretive drift is artificial intelligence-based chat systems (in particular ChatGPT), which are used by pilgrims to record spiritual experiences, keep digital diaries, verbalize inner experiences, and structure individual narratives in the social and communication space (OpenAI, 2023; Zhou et al., 2023).

In this context, the concept of double coding allows us to capture the binary structure of meaning-making in pilgrimage, where the ritual-institutional level coexists with the open interpretive space

of personal experience (Turner, 1969). The explicit and implicit codes of pilgrimage in this study are conceptualized, respectively, as the institutional-ritual and interpretive-narrative levels of social communication, the interaction of which explains the mechanisms of adaptation of pilgrimage practices to the conditions of modern media culture (Eade & Sallnow, 1991; Couldry, 2012; Hjarvard, 2013).

Table 1

Double coding of pilgrimage as a social and communication institution

Level of analysis	First code (explicit) Institutional-ritual	Second code (implicit) Interpretive-narrative
Ontological level	Physical movement to a sacred place	Inner spiritual path
Type of practice	Ritual, bodily, spatially fixed	Symbolic, reflective, narrative
Form of communication	Regulated, institutional	Individual and collective-interpretive
Key elements	Route, ritual, shrine, rules, norms	Personal experience, inner meaning, spiritual transformation
Material/sign media	Path, sacred objects, pilgrim's passport, bodily practices	Images, symbols, memories, narratives
Level of meaning-making	Reproduction of established sacred meanings	Interpretation and reinterpretation
Role of media	Fixation and representation of the event	Translation, interpretation, storytelling
Social function	Institutional stability of pilgrimage	Cultural dynamics and interpretive drift

Conclusions. Within the social and communication approach, pilgrimage appears not only as a religious practice, but as a complex institutionally organized communicative process, which combines normatively given structures and individually and collectively constructed meanings. The application of the concept of double coding allowed us to record the binary nature of this process, which is based on the interaction of an explicit institutional code and an implicit interpretive code (Turner & Turner, 1978; Vidal Casellas, Aulet & Crous Costa, 2019).

Analysis of the Dual Pilgrimage program has shown that the formalized requirements for walking the Kumano Kodo and Camino de Santiago routes, the credential system, and the completion stamps function as an explicit communicative code that provides institutional legitimation for the pilgrimage experience. At the same time, these material and symbolic markers do not exhaust the meaning of the pilgrimage, but rather serve as entry points for individual reflection, narrative reinterpretation, and mediatized representation of the personal spiritual journey (Hussain & Wang, 2024).

It is right in this zone of interaction between the normatively assigned meaning of a sign and its subjective and public interpretation that interpretive drift manifests itself - a process of gradual displacement and multiple recoding of meanings in social space. In the case of Dual Pilgrimage, interpretive drift manifests itself in the transformation of the institutional status of the «double pilgrim» from a formal confirmation of the passage of routes into a symbol of transnational identity, spiritual mobility and personal biographical significance, which actively circulates through narratives, visual images and digital media (Couldry, 2012; Hjarvard, 2013; Couldry & Hepp, 2017).

Thus, the double coding of pilgrimage is not reduced to a mechanical layering of meanings, but appears as a dynamic communicative structure in which institutional stability is combined with openness to interpretive transformations. The case of «Dual Pilgrimage» demonstrates that contemporary pilgrimage programs can function as laboratories of social meaning-making, in which religious tradition, bodily experience, and media communication form a single social and communication institution capable of adapting to cultural and technological transformations without losing symbolic integrity (Reader, 2007).

The concept of double coding proposed in the article complements the theoretical approaches of pilgrimage studies, offering an analytical framework for studying pilgrimage as a social and communication institution in the context of contemporary socio-cultural dynamics.

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IDEOLOGY AS A MOTIVATIONAL TECHNOLOGY IN MANAGEMENT
(A Sociological Approach)

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Abstract. In the contemporary world, one of the key directions of social management technologies is the mobilization of individuals and social groups toward the achievement of specific goals. Ideology is a system of ideas and beliefs that defines the value framework and objectives of society and guides individual and collective behavior. In modern conditions, ideology functions not only as a form of political and social consciousness but also as a motivational technology. From this perspective, the capacity of ideology to stimulate and regulate human behavior transforms it into an essential instrument of social management and motivational mechanisms. The application of ideology as a motivational technology in modern management and social technologies creates opportunities for harmonizing individual goals with collective objectives. This, in turn, constitutes a crucial factor for social stability, development, and cohesion. The purpose of this study is to provide a scientific explanation of ideology as a motivational technology in management and to demonstrate its mechanisms of application.

Key words: management, ideology, motivation, social technology, socio-political analysis, sociological perspective, conceptual model, social norms, values, belief, social control system.

Introduction. Management and ideology are two fundamental concepts that shape the structural and value systems of social life. Management ensures the purposeful coordination of organizational, economic, and political activities within society, while ideology defines the moral and political foundations, legitimacy, and direction of this management. From a sociological perspective, the interaction between management and ideology plays a significant role in processes of maintaining social order, as well as in the transformation or reconstruction of that order.

The aim of this research is to provide a scientific interpretation of ideology as a motivational technology in management and to reveal its mechanisms of application. In order to approach the problem systematically, it is first necessary to examine the concept of ideology, its essence, and its social functions. In a broad sense, ideology is a system of ideas that shapes the worldview of individuals and society. The term *ideology* is of Greek origin and was introduced into scientific discourse by one of the last representatives of the French Enlightenment, the philosopher and economist Antoine Destutt de Tracy, in his work *Elements of Ideology* (1801). According to the French scholar, ideology is the science of the emergence and development of ideas derived from sensory experience. His followers, Cabanis in *On the Relations between the Physical and Moral Nature of Man* and Volney in *The Physical Principles of Morality*, also supported this claim.

Before the emergence of the term *ideology*, scholars concerned with the history of ideas included French Enlightenment thinkers such as Condillac, D. Diderot, Holbach, C. Helvétius, and P. La Mettrie. It should also be noted that the emergence of leading ideologies was strongly influenced by the Great French Bourgeois Revolution and the polemics surrounding its consequences for humanity, which served as a powerful intellectual impulse (Ismayilov, 2013, p. 27).

Among classical theorists, K. Marx explained ideology as the "worldview of specific social classes." Antonio Gramsci, in turn, regarded ideology as a manifestation of *cultural hegemony*. The principal

position of many scholars has been to draw a strict distinction between ideology and science, thereby denying the cognitive functions of ideology. M. Weber associated ideology, like other worldviews and religious systems, with the sphere of belief and thus rejected even the formulation of the question concerning its scientific nature.

Karl Mannheim linked the emergence of the phenomenon of ideology to the works of the English thinker F. Bacon, particularly to his theory of the "idols of the mind," while identifying a number of ideas concerning ideologically distorted cognition in the works of N. Machiavelli and D. Hume (Mannheim, 1994). Political scientist U. Matz likewise evaluated political worldview as a form of belief (Matz, 1992, pp. 130–131).

Ideology as a Motivational Technology

In analyzing the topic, the first concept to be addressed is *motivational technology* and its main components. Motivational technology refers to a set of purposeful methods and mechanisms applied to change the behavior of individuals or collectives in a desired direction. The core components of this technology include the following: a system of values; symbols and myths; emotional appeals; collective identity; and the attractiveness of goals. These components enhance the socio-psychological impact of ideology, transforming it into a motivating technology.

The application of ideology as a motivational technology can be observed in various spheres. These include the political sphere–such as the mobilization of voters and the management of public opinion; the economic sphere–through ideological campaigns aimed at increasing labor productivity; education–by fostering youth in a national spirit and strengthening a sense of responsibility; and the military and security sphere–through military and patriotic motivation.

In the modern era, ideology functions not only as a system of ideas but also as a motivational technology. It has become a technological instrument that directs human behavior, mobilizes society, and occupies an important place in the state's management process. When this technology is constructed and implemented on a scientific basis, it can yield effective results for social integration, development, and sustainability.

Management, in turn, is a mechanism for organizing goal-oriented activity within the social system and coordinating resources and behaviors. Management is not merely a technological or organizational activity; it also encompasses the regulation of social relations. At the same time, management is прежде всего a specific form of conscious activity through which individuals and social groups pursue their objectives. It includes the preparation and implementation of decisions, regulatory actions and information exchange, the determination of priorities, and the achievement of concrete goals. Management is also a complex of human actions directed toward a given object and its transformation, based on the intellectual level of society.

Ideology, finally, is a worldview that expresses the general interests, values, and goals of a particular social group or of society as a whole.

Karl Marx defined ideology as a "system of ideas that expresses the interests of the ruling class," whereas Max Weber explained it as a "form of meanings and values that orient social action." In a sociological sense, ideology ensures social integration within society, creates normative orientations, and provides justification for the legitimacy of the system of governance.

When analyzing the interaction and mutual influence between the concepts of ideology and management, it is necessary to begin with an examination of the functions of ideology. Ideology is one of the fundamental elements that ensures the stability of the governance system. Its main functions can be outlined as follows.

First, the normative-functional function, which forms rules of behavior and a system of values essential for governance. Second, the motivational function, whose role is to mobilize social actors around common goals. Third, the legitimizing function, which justifies the legality and authority of governance structures and power relations. Fourth, the integrative function, which fosters solidarity

among different social groups. Fifth, the innovative function, which provides an ideological basis for social change and encourages renewal.

Based on the above, it can be concluded that ideology is a social mechanism that supports the governance system at both normative and psychological levels. Ideology is also a system of ideas, views, values, and goals related to political, social, economic, and moral spheres. It shapes people's worldviews, directs their behavior, and forms a mode of interpreting social reality.

As noted above, ideology skillfully performs the role of a social mechanism within society. In other words, it can be regarded as one of the principal instruments of influence applied in social governance, the regulation of social behavior, and the orientation of public relations. Ideology is not merely a collection of ideas, views, or opinions; it is an active instrument of social influence. Among its main characteristics as a social mechanism are its impact on mass consciousness, the creation of a value system, and the formation of social solidarity.

When analyzing the interaction between ideology and governance, the key point to emphasize is that ideology serves simultaneously as the ideological foundation of governance, its social support base, and a mechanism of public consent. In the course of this analysis, two main dimensions become evident: ideology functions in governance both as a social mechanism and as a mechanism of public consent. From this perspective, it can be concluded that governance without ideology becomes mechanical, while ideology without governance remains ineffective.

In examining the characteristics of ideology as a social mechanism and as a mechanism of public consent, it is also appropriate to refer to the assessment proposed by A. Gramsci.

Antonio Gramsci conceptualized ideology primarily as a mechanism for producing consent rather than coercion. In his works, he emphasized that ideology operates not through force but through cultural hegemony, exercising dominance over society via media, education, religion, and culture (Gramsci, 1971). According to Gramsci, ideology teaches individuals how to perceive reality and ensures the legitimacy of social relations. In this sense, ideology regulates social behavior internally and maintains power and stability without resorting to violence.

Gramsci also viewed governance as a mechanism of social domination grounded in ideological and cultural hegemony. If ideology functions as a mechanism for generating consent, then governance, in his view, should rely not on coercion but on consent-based rule. From this perspective, it can be concluded that an ideology capable of producing consent gives rise to a governance system that is itself administered through consent.

Gramsci explained governance as resting on two fundamental pillars: coercion and consent. Coercion is embodied in institutions such as the police, the army, and the judicial system, whereas consent is produced through ideology, culture, education, and the media. Governance, therefore, is not merely about decision-making; it also involves the formation and preservation of values.

Within governance, ideology can also be understood as a motivational mechanism. Motivational technology refers to the aggregate of ideological, social, and psychological instruments used to direct the activities of individuals and social groups toward a desired direction. When speaking of ideological motivation, concepts such as belief, values, belonging, and identity come to the forefront.

When analyzing the role of ideology's motivational function in governance, a logical chain of reasoning emerges, which may be described as the central question of a cognitive map. First, motivation enhances the individual's sense of meaningful action within the sphere of governance; subsequently, it fosters a sense of unity around a shared idea within the collective, thereby generating loyalty. At the same time, as Gramsci emphasized, this process liberates governance from reliance on coercion. According to Gramsci, when individuals are governed through ideology, they submit not through force but through consent.

This perspective can be considered convincing, as ideology, when functioning as a motivational technology in governance, transforms obedience into conscious behavior. Nevertheless, it should also

be acknowledged that ideology, when employed as a motivational technology in governance, may give rise to certain risks.

When employed as a motivational instrument, ideology may weaken critical thinking, intensify the risk of manipulation, and simultaneously create favorable conditions for authoritarian governance. Therefore, when ideology performs a motivational function in governance, it must be balanced with humanistic values, a legal framework, and transparency.

Governance practice is always constructed upon a certain ideological foundation. For example, the liberal governance model is based on the principles of individual freedom, a market economy, and minimal state intervention; the social-democratic model emphasizes social equality, justice, and the social responsibility of the state; the authoritarian model prioritizes political stability and centralized control; while the national ideological model is grounded in principles of national identity, cultural values, and sovereignty.

In sociology, the relationship between governance and ideology is analyzed through several theoretical approaches. Functionalism (T. Parsons) views ideology as a means of preserving the stability of the social system, while governance functions as the mechanism through which this stability is implemented. Conflict theory (K. Marx, R. Dahrendorf) interprets ideology as a tool used to justify social inequality, with governance serving the interests of the ruling class. Symbolic interactionism (H. Blumer, E. Goffman) emphasizes that ideology is reproduced through symbolic meanings in everyday interactions. The systems approach (N. Luhmann) conceptualizes governance and ideology as communicative subsystems that interact within the broader social system.

Globalization and the development of information technologies have generated new forms of ideology, such as digital ideology, information ideology, as well as ecological and gender ideologies. Contemporary governance models–such as e-governance, open government, and strategic communication–are no longer merely administrative mechanisms but also carriers of ideological content.

Governance and ideology constitute two fundamental mechanisms that complement one another in the preservation, transformation, and legitimization of social order. From a sociological perspective, ideology provides the moral foundation of governance, while governance represents the practical mode of implementing ideology. In modern societies, the scientific analysis of this interaction is one of the key conditions for social stability and development.

At the same time, ideology ensures the reproduction of society's social structure. Each social stratum and institution operates within specific ideological orientations. For instance, the political elite plays a leading role in the formation and legitimization of ideology; the middle class functions as a social pillar of ideological stability; and youth and the education sector constitute the primary social resource for the renewal and adaptation of ideology.

In the twenty-first century, the sphere of ideological influence has shifted into the digital environment. Under the conditions of the information society, new forms of ideological governance have emerged, including the following:

- Digital ideology – mechanisms of ideological influence exercised through social networks, media platforms, and online content;
- Information management – the construction of ideological strategies based on the monitoring and forecasting of public opinion;
- Cyber-social control – the online regulation of behavior and its ideological orientation;
- Soft power – the use of ideology as an instrument of cultural influence in the international arena.

These processes elevate ideology beyond the level of state policy to that of a broader social communication strategy. Ideology and governance function as two interdependent elements of the social system, and their interaction ensures the continuity of society's value order. Governance without ideology acquires a technocratic character, while ideology without governance loses its practical effec-

tiveness. Sociological analysis demonstrates that ideological governance is not merely an instrument of power but also a mechanism that fosters social integration and the formation of identity. In the contemporary era, the scientific study of these relationships carries strategic importance for the effective management of social order.

In this context, the ideas of the Italian sociologist Antonio Gramsci once again become relevant. Ideology serves not only as a tool of political power but also as the principal instrument of cultural hegemony. Hegemony implies governance based more on consent than on physical coercion. From this perspective, the sociological stability of governance depends on the depth of ideological hegemony: if the dominant ideology is accepted by the majority of social groups, governance is regarded as legitimate; if ideological fragmentation emerges, governance confronts a crisis of legitimacy.

Thus, ideology forms not only the legal and political foundations of governance but also the moral platform that ensures public consent. Every social transformation–such as modernization, globalization, or technological revolution–requires the renewal of the ideological system. Sociological analysis indicates that the transformation of governance demands adaptation not only at the structural level but also at the ideological level. For example, during the transition from a planned economy to a market economy, liberal economic ideology comes to the forefront; in the shift from authoritarian governance to a democratic system, the ideology of civil society gains strength; and in the formation of nation-states, national ideology plays a leading role.

From a sociological perspective, this demonstrates that ideology is not only a moral foundation of governance but also a historical and cultural mechanism of change. A sociological synthesis reveals that ideology performs a three-level role in governance: at the macro level (state and politics), ideology shapes the conceptual basis of state strategy; at the meso level (institutions and organizations), ideological principles influence organizational culture and decision-making processes; and at the micro level (individuals and groups), ideological values exert social control over individual behavior and identity. When the balance among these levels is disrupted, social disharmony, cultural alienation, and a crisis of values emerge within the governance system.

In analyzing ideology as a motivational technology within the system of governance, it is methodologically appropriate to examine its operation by dividing it into distinct stages, as this approach allows for more accurate conclusions. In other words, it is necessary to construct a conceptual model of ideology as a governance technology. At the initial stage, ideological content is formulated; subsequently, it is transmitted to mass consciousness through social institutions. At the next stage, the psychological dimension becomes salient, as ideology is transformed into belief. Through this process, motivation is generated; where motivation exists, behavior is directed, and as a result, belief is converted into loyalty, which ultimately contributes to the formation of social stability.

The theoretical and scientific analysis conducted demonstrates that ideology can be understood as a systematized set of ideas that expresses the interests, goals, and intentions of large social groups. At the same time, ideology functions as a form of corporate thinking, reflecting a group's perspective on political and social development. Ideology aims to instill in mass consciousness the criteria relevant to the present moment and the future development of society. Within the governance system, ideology operates not only as an element of worldview but also as a motivational mechanism.

As a motivational technology, ideology establishes a linkage between the objectives of governance actors and the needs of individuals, thereby ensuring the direction of social behavior. When examined against the backdrop of the developmental dynamics of Azerbaijani society, it becomes evident that national ideology, the concept of *Azerbaijanism*, traditions of statehood, and national interests have played the role of key ideological resources generating motivation in governance during the formation of Azerbaijani statehood. The ideology of Azerbaijanism creates internal motivation within governance, regulates citizens' behavior on a voluntary basis, strengthens socio-political stability, and elevates national development goals to the level of mass support.

These observations clearly indicate that ideology in Azerbaijan functions as one of the principal motivational pillars of the governance model and governance culture, while also serving as a social mechanism that ensures the long-term sustainability of this pillar. The conclusions derived from the sociological analysis conducted have been identified in the following sequential order.

Conclusion. The conducted research shows that ideology is not only a systematization of ideas but also a powerful motivational tool that guides human activity. This motivation has an effective character. In other words, ideology functions simultaneously as a system of values and as a motivational technology that plays an important role in directing individual and collective behavior. In modern governance and social technologies, the application of ideology as a motivational technology creates conditions for harmonizing individual goals with social objectives, which is a crucial factor for societal stability, development, and unity.

1. Ideology and governance, as interrelated social mechanisms, shape the value structure of society.
2. Ideological power constitutes a fundamental condition for the legitimacy and stability of governance.
3. In the era of digitalization, ideology acquires new communicative and cultural forms.
4. The sociological analysis of governance demonstrates that ideology is not only a political phenomenon but also a moral and institutional one.
5. In the Azerbaijani context, national ideology serves as the principal moral foundation of governance culture.

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"INTERPRETING THE PAST" IDEOLOGICAL CONSTRAINTS ON THE ARCHAEOLOGY OF CAUCASIAN ALBANIA IN SOVIET AZERBAIJAN

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Abstract. During the Soviet era, Marxism and autochthonism exerted a profound influence on the archaeological research conducted in Azerbaijan, shaping its theoretical frameworks, methodologies, and interpretations. By emphasizing the materialistic interpretation of history, Marxist archaeology focused on economic and social structures as the primary drivers of social change. For instance, archaeological studies frequently highlighted the transition from hunter-gatherer societies to agricultural communities, aligning with the Marxist stages of historical development, such as primitive communism and feudalism. Soviet archaeologists in the South Caucasus often interpreted archaeological finds through the lens of class struggle, a core tenet of Marxism. Furthermore, archaeological research was frequently driven by state programs aimed at legitimizing Soviet ideology and promoting the concept of a shared socialist heritage within the USSR. As a political and social ideology emphasizing self-determination and local autonomy, autochthonism also influenced archaeological research in the region, particularly during the transition to the post-Soviet period. Competing claims over cultural heritage occasionally hindered collaborative research and led to biased interpretations of archaeological data. While Marxism provided a unified, materialistic framework for understanding the past, it often imposed significant ideological constraints on archaeological interpretations.

Key words: Azerbaijan, Soviet, Marxism, Autochthonism, Archaeology, Albania.

Introduction. Research into the influence of the Soviet political structure and its governance mechanism on the scientific environment is generally weak, and in post-Soviet countries, such research is almost nonexistent. Neglect of the Soviet sphere was institutionally based, as postcolonial studies depend on the interests of specific scholars in concrete regions (Annus, 2011, p. 25).

Opinions regarding this period became polarized after Perestroika. For Soviet archaeologists close to the political establishment, the Soviet era was a successful period (Lozny, 2017, p. 80). The same problem persists in Russia itself. Ewa Tompson writes that, "The politics of interpretation still informs imperial thinking. Russian history must be reworked in contemporary terms" (Tompson, 2008, p. 417). Therefore, it becomes necessary to illuminate the political and ideological conditions under which historical and archaeological research was conducted during the period in question, and to evaluate the processes within the era's own code. Soviet Marxism (i.e., Leninism, Stalinism, and post-Stalin currents) was not simply an ideology advanced by the Kremlin to rationalize and justify its policies, but also expressed the realities of Soviet phenomena in various forms (Markus, 1985, p. 1).

Discussion. The influence of this political center on scientific research and archaeological interpretations in the countries dependent on it has also been documented previously. Due to ideological pressure, some problems were interpreted from the perspective of the dominant conception (AMEA, 2007, p. 130). Jerzy Gąssowski, in assessing the state of archaeology in the Soviet Union, notes that, "Soviet Russia significantly influenced the archaeologies of other countries politically dependent on it" (Lozny, 2017, p. 1). Soviet archaeology is divided by L. Kleyn into two stages: 1917–1934 (archaeology of the revolution period) and 1934–1991 (archaeology of the Soviet period). Marxism's genuine penetration into Soviet archaeology began in the mid-1920s (Lozny, 2017, p. 62).

Artsikhovsky and Ravdonikas, along with other young archaeologists, developed a "Marxist" approach to the interpretation of archaeological data between 1926 and 1929 (Trigger, 2006, p. 328, 330). In Leningrad, Vladislav Iosifovich Ravdonikas criticized pre-revolutionary Russian archaeology as empiricist and "artefactology," viewing its orientations as conditioned by class interests (Lozny, 2017, p. 68). According to the "Marxist" approach, the archaeologist's goal was not the analysis of artifacts, but rather the reconstruction of societies based on ideological concepts. In the early 1930s, two main ideological paradigms were introduced into Soviet archaeology (Trigger, 2006, p. 327). Trigger groups them under the Cultural-Historical Approach. Stadialism (the stages theory), primarily elaborated by Vladislav I. Ravdonikas and Sergey N. Bykovsky, was based on the hypothesis that ethnic history could transition from one social stage (such as slavery or feudalism) to another without any external influence. Inspired by Marr, the faculty of GAIMK (State Academy for the History of Material Culture) in Leningrad–S. N. Bykovsky, V. I. Ravdonikas, E. Y. Krichevsky, and others–introduced the idea of the "new language teaching" into archaeology and built the "stadial theory" (the stages theory) upon it.

According to this theory, societies everywhere developed stage by stage through revolutionary leaps, reorganizing their social organizations under the influence of the economy (Lozny, 2017, p. 69). In the early 1920s, Russian scholars V. Bartold and A. Pakhomov gave lectures on the history of Azerbaijan in Azerbaijani schools. In these lectures, A. Pakhomov claimed that the national formation process for the Azerbaijani people was long and unstable, changing against the backdrop of differing religious affiliations (Shnirelman, 2001, p. 97). He noted that the local inhabitants continued to live on their lands in the eastern part of the Caspian Sea, regardless of linguistic and cultural changes (Pakhomov, 1923, pp. 9-21). Russian historian-archaeologist Sysoev stated that the Khazars living in the territory of Azerbaijan were included in the Achaemenid Empire during the reign of Cyrus the Great, and were previously mentioned in Urartian inscriptions by the names Etiuni and Uluanili. Sysoev wrote that the original Albanians differed from the Turks in their language and were related to some Caucasian peoples. Relying on the archaeological data known at the time, Sysoev located the Albanian culture in the southwestern part of Soviet Azerbaijan (Sysoev, 1925b, p. 29).

Starting in 1920, I. M. Meshchaninov and A. Alekberov conducted research on numerous cup graves (küp qəbirlər) and other monuments in the territories of Mirbashir, Shaki districts, and the Mil plain (Göyüşov, 1986, p. 72). Academician Meshchaninov, who studied the cup graves between 1927 and 1935, was interested in the Urartu period. He recommended that Azerbaijani researchers learn cuneiform to search for traces of Urartian invasions and conduct archaeological research in the Azerbaijani territory between the Kura and Aras rivers (Shnirelman, 2001, p. 96). Another Soviet scholar involved in the ancient and early medieval history of Azerbaijan, Academician A. Krymski, divided Caucasian Albania into two parts with the Kura River as the border. The term "Arran" was associated only with the right bank of the river, while the left bank is now called Shirvan (Krymsky, 1934, pp. 289-295). He also used this division in the study of Christianity in the region, claiming that Byzantine Orthodoxy spread on the left bank of the Kura River, while the Armenian Monophysite sect spread on the right bank. Around 700 AD, the Albanian-Armenian Church on the right bank of the Kura River cursed the Orthodox Church, which held a firm position on the left bank (Krymsky, 1934, pp. 294–295, 299).

The archaeologist F. Osmanov wrote that the names of the mentioned settlements and cities had no direct analogue in modern toponymy (Osmanov, 1984, p. 17). R. Vahidov noted that the territory of Azerbaijan had not been thoroughly studied from the historical-geographical and toponymical point of view until that time (Vahidov, 1961, p. 15).

In 1925, archaeologist S. Qazıyev conducted reconnaissance work in Gabala. In 1926, I. Jafarzadeh and D. Sharifov carried out excavations in the Yaloylutapa area (Ismizade, 1956, p. 9). These studies were the first in a series of complex investigations reflected in Ö. İsmizadə's 1956 book, Yaloylutapa

Culture. Although Lalayan had conducted archaeological excavations in this area before the Soviet period in 1915, Ö. İsmizadə noted his low professional level (Ismizade, 1956, p. 7). In the 1930s, influenced by N. Marr's autochthonist views, Azerbaijani archaeologist A. Alekberov argued against seeking ancestors for the Armenians and Azerbaijanis living in Azerbaijan's territory elsewhere, stating that they were historical locals. He claimed that both peoples originated from local Garabagh and shared the same culture (Alekberov, 1932, pp. 191–192).

In the spring of 1939, the first version of the History of the Azerbaijan SSR was completed and discussed at a scientific session of the History and Philosophy Department of the USSR Academy of Sciences in May. The book identified the ethnic identity of the Azerbaijani population as Azerbaijani and presented the Armenians as the local population of Garabagh (AzFAN, 1939, pp. 35–36, 72–74). In the book, S.T. Yeremyan wrote a section superficially reflecting the pre-feudal history of Albania, based on minimal information from ancient sources and without using archaeological data (Osmanov, 1984, p. 13). During the war years, no large-scale archaeological research was conducted in Azerbaijan; only reconnaissance work related to accidental finds was performed (Khalilov, 1985, p. 16). After World War II, the Soviet empire began to pursue a victorious state policy. On June 7, 1945, Soviet Foreign Minister Vyacheslav Molotov informed Turkey's ambassador in Moscow that the USSR demanded a review of the Soviet-Turkish border (Suny, 1993, p. 225).

To settle Armenians in the claimed territories, the Soviet government organized the repatriation of Armenians living abroad (Gal et al., 2010, p. 123). Between 1946 and 1948, 90,000–100,000 Armenians moved to Soviet Armenia from various countries (Liberedian, 2007, p. 25). Simultaneously, the mass displacement of the Azerbaijani population of the Armenian SSR began between 1947 and 1950, with 100,000 Azerbaijanis being deported (Saparov, 2003, pp. 187-188). In 1950, the rise of Russian nationalism, inspired by Stalin, ended Marr's entire theory, including stadialism. Stalin declared that N. Marr was not a Marxist and that his teaching was wrong. The "stadial theory" was rejected (Lozny, 2017, p. 76). In 1950, V. N. Leviatov's article attempted to shed light on a number of socio-economic problems in the history of Albania (Osmanov, 1984, p. 13). Extensive stationary archaeological research was carried out in Mingachevir for seven years (1946–1953) under the leadership of S. Qazıyev (Khalilov, 1985, p. 16).

From the 1950s onwards, the southwestern part of the Azerbaijan SSR's territory was presented in the Armenian SSR as part of ancient Armenia. Armenian historians claimed that the ethnogenetic process resulted in the emergence of a Greater Armenia composed of a single language people (Yeremian, 1951, pp. 49—50; Arakelian & Ioannisian, 1951, pp. 35, 38). S. Yeremyan was an ardent defender of the autochthonist conception of Armenian ethnogenesis (Shnirelman, 2001, p. 50). R. Hewsen noted that the majority of the population living there were neither Armenian nor even Indo-European (Hewsen, 1982, p. 33). In the publications of the period, the idea that the population of the Arshakid kingdom consisted only of Armenians became common (Shnirelman, 2001, p. 8). Generally, archaeological research in the claimed territories was very weak until that period (Melikset-Bek, 1966, p. 6).

One of the leading figures in Albanian studies in the 1950s was undoubtedly Z. Yampolski. In 1957, he claimed that the temple built in Gis was located in the village of Kish in Shaki (Yampolski, 1957, p. 156). Since 1959, archaeological expeditions have been organized to the Gabala, Shamakhi, Aghdam, and Gakh regions (Göyüşov, 1986, p. 72). Albanologist researchers considered K. Trever's book, published in 1959, to be the first significant scientific work reflecting general historical and archaeological research on Albania (Shukurov, 2023, p. 12). In 1962, Z. Yampolski noted that researchers were unable to definitively describe the social structure that existed in Albania (Yampolski, 1962, p. 11). In the 1960s, Z. Bunyadov determined the foundations of the Azerbaijani Albanology concept (Shukurov, 2023, p. 13).

Between 1958 and 1973, archaeological excavations were carried out in Khınıslı, where more than 3,500 artifacts were discovered (Khalilov, 1985, p. 19). Prior to this, no archaeological excavations

had been conducted in the Shamakhi region (Jafarzadeh, 1985, p. 13). Permanent archaeological excavations began in the city of Gabala in 1959. Material culture samples belonging to the Antique period were discovered (Khalilov, 1985, p. 21). As a result of these studies, the historical borders of Albania were equated with the borders of the Azerbaijan SSR (Khalilov, 1985, p. 11; Göyüşov, 1990, p. 177). Archaeologist R. Goyushov noted that the population living in the plain part was subjected to Islamization, the population of the southeast of the Lesser Caucasus to Gregorianization, and the population of the southwest of the Greater Caucasus to Georgianization (Göyüşov, 1984, p. 145). The research of historian F. Mammadova on the political-geographical history of Albania was the last comprehensive work that fully reflected the ideological concept of Soviet Albanology (Mammadova, 1977, 1986).

Conclusion. The study demonstrates that the archaeology of the ancient period in Azerbaijan during the Soviet era was directly dependent on the political and ideological conjuncture of the central government. This dependency significantly shaped the direction of scientific research and the interpretation of findings. Based on the analysis, the following generalizations can be made:

Ideological Paradigms: Between the 1920s and 1950s, archaeological data were interpreted through the lens of class struggle and within the framework of N. Marr's theories of "stadialism" and "autochthonism."

Political Conjuncture: Following Stalin's intervention in linguistics in the 1950s, "stadialism" was rejected. However, archaeology subsequently became a new arena for imperial interests and territorial claims by neighboring republics.

Ethnogenetic Disputes: The territorial claims put forward by the Armenian SSR regarding the southwestern lands of Azerbaijan were accompanied by attempts to "Armenianize" the archaeological heritage. In response, Azerbaijani Caucasian Albanian studies developed its own defensive concept through the work of scholars such as Z. Bunyadov, I. Aliyev, and F. Mammadova.

Expansion of the Material Base: Despite ideological pressures, large-scale excavations in areas such as Mingachevir, Gabala, and Khinisli enabled the collection of rich factual material regarding Azerbaijan's ancient period.

In conclusion, Soviet archaeology served not only as a science studying the past but also as a tool for rationalizing the state's official ideology. Re-evaluating the research of this period by purging it of imperial thought is one of the primary tasks facing modern Azerbaijani historiography. The influence of Marxism and Autochthonism on archaeology in Azerbaijan reflects the broader historical and political changes in the region. While Marxism provided a materialist approach to understanding the past, Autochthonism localized the view of tangible cultural heritage. Both ideologies have left lasting imprints on the study and interpretation of the region's rich and complex history.

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ECONOMIC ASPECTS OF AZERBAIJAN–CHINA COOPERATION IN THE CONTEMPORARY PERIOD

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Abstract. Expanding mutually beneficial cooperation with the world's leading states is currently one of the key directions of the foreign policy of the Republic of Azerbaijan. In this context, relations with the People's Republic of China (PRC) are of particular importance. Historically, China maintained close economic, trade, and cultural ties with the South Caucasus region, of which Azerbaijan is a part, located along the Great Silk Road. Following the incorporation of the region into the Russian Empire in the early nineteenth century, and especially during the existence of the USSR, these ties were completely severed. Profound changes that occurred in the world and the region at the end of the twentieth century, the collapse of the Soviet Union, and the independence of the South Caucasus republics created new conditions for the restoration of these relations. The favorable geographical position of the South Caucasus and the rich oil and gas resources of the Caspian Sea increased China's interest in the region, as was the case with other global actors. In recent years, the PRC has begun implementing large-scale projects in the region in order to strengthen its positions. Naturally, while pursuing its policy toward the South Caucasus, China seeks to take into account the interests of both neighboring states with traditionally strong influence in the region (Russia, Turkey, Iran) and extra-regional powers such as the EU and the United States making significant efforts to extend their influence there.

In the 1990s, the South Caucasus was not of major geopolitical interest to the PRC, and China focused primarily on expanding its economic presence in the region. After consolidating its position in geographically closer Central Asia, China began to incorporate the South Caucasus into its sphere of interests and to establish close political relations with the states of the region. These relations are primarily based on the South Caucasus's favorable transport and communication infrastructure and its abundant energy resources. Beijing seeks to achieve its objectives both through the implementation of various infrastructure projects and through investment. The largest of these projects is the Belt and Road Initiative (BRI). China's main goal in implementing this initiative is to strengthen its position in post-Soviet countries, including the South Caucasus. As a result of this policy, China has, within a relatively short period, become one of the key trade and economic partners of the South Caucasus countries. At the same time, the states of the region regard the strengthening of relations with the PRC as an important factor in safeguarding their economic interests, particularly in terms of diversifying foreign economic and trade relations.

Since the launch of the Belt and Road Initiative in 2013, China's economic presence in the South Caucasus has gradually expanded. The purpose of this article is to trace the dynamics of China's economic penetration into the South Caucasus countries especially the Republic of Azerbaijan and, based on an analysis of official Chinese and Azerbaijani statistical data on trade, investment, lending, and other areas, to assess the current scale of China's economic involvement in the South Caucasus, including Azerbaijan.

Key words: Republic of Azerbaijan, People's Republic of China, South Caucasus, bilateral relations, economic cooperation, transport and communication potential, "Middle Corridor," "Belt and Road Initiative".

Introduction. One of the key prerequisites for the socio-economic development of any country is its economic cooperation with other states. From this perspective, the relations of the Republic of Azerbaijan with the People's Republic of China (PRC), one of the world's leading economies, are of particular importance.

The growing influence of China across the entire Eurasian space has generated not only economic but also geopolitical consequences. The South Caucasus is increasingly emerging as a new focal point

of this influence. China is gradually extending to the South Caucasus the model it previously tested in its immediate neighborhood, Central Asia namely, the consolidation of its position through infrastructure projects and investment. This trend has been further reinforced by ongoing global developments and processes, including the West-Russia confrontation, the war in Ukraine, and the crisis in the Middle East, as well as by the growing international interest in China's economic development experience. At the same time, the Belt and Road Initiative has become an important instrument of China's influence in the region (Silver, 2022).

Through these projects and initiatives, China has significantly strengthened its positions in the infrastructure and energy sectors of the South Caucasus countries. By signing numerous agreements with each of the South Caucasus states, China also demonstrates an individualized and differentiated approach toward each of them. Nevertheless, the core objective enhancing economic and political influence in the region remains unchanged. *China views the South Caucasus not only as a strategic component of the "Middle Corridor" connecting Asia and Europe, but also as a political arena of competition amid ongoing geopolitical transformations.*

In recent years, Beijing's increasing attention to the South Caucasus has become more evident. This is also confirmed by the growing dynamics of bilateral relations between Azerbaijan and China. From the perspective of defining the future development trajectories of both the South Caucasus and the Republic of Azerbaijan, the study of these relations is of particular relevance. This article examines the stages and prospects of the development of relations between the Republic of Azerbaijan and the People's Republic of China in the contemporary period.

Main Part. Diplomatic relations between the Republic of Azerbaijan and the People's Republic of China were established on 2 April 1992. The official visit of the President of the Republic of Azerbaijan, Heydar Aliyev, to the PRC in 1994 laid the foundation for the development of bilateral relations. Over a 34 year period, political, economic, and cultural ties between the two countries have developed dynamically. The official visit of President Ilham Aliyev to China in 2005 and his state visit in 2015 played a significant role in advancing bilateral relations. In the following years, Ilham Aliyev paid four additional visits to the PRC. These visits not only deepened diplomatic and political contacts between the two countries but also had a positive impact on the further expansion of economic cooperation.

Following the signing of a number of important documents during President Ilham Aliyev's visit to the PRC in 2015 including the Memorandum of Understanding on the joint implementation of the "Silk Road Economic Belt" between Azerbaijan and China substantial progress was achieved by both sides. This cooperation clearly demonstrates the mutual interest of the two parties. China has sought to expand systematic relations with the CIS countries by implementing its strategic objectives, particularly through initiatives such as the Belt and Road Initiative and the Silk Road Economic Belt, thereby aiming to maximize its influence in the South Caucasus. Azerbaijan, in turn, has sought to leverage the advantages of its unique geographical location to position itself as a transport and logistics hub between Europe and Asia, placing high expectations on the deepening of relations with China.

In line with these objectives, the Republic of Azerbaijan also emerged as an initiator of the concept of the "Great Silk Road." In September 1998, an international conference held in Baku adopted decisions on the restoration and development of this route. The primary aim of the project was to develop and implement action programs focused on enhancing trade, economic, and transport relations among the countries of the region.

During this period, Azerbaijan-China relations primarily covered three key areas: transport corridors, including trade and logistics; energy; and the development of new technologies. In subsequent years, these areas remained the main directions of development in Azerbaijan-China relations.

The second half of the 2010s marked an important stage in the development of cooperation between the two states in the field of transport and logistics. In his speech at the Munich Security Conference

in 2017, the President of the Republic of Azerbaijan, Ilham Aliyev, emphasized that increasing cargo transportation through Azerbaijan and across the Caspian Sea would play a crucial role in the country's economy. He noted that cargo transit is more valuable than natural resources, as natural resources will eventually be depleted, whereas a reliable and modern transport infrastructure enables a country to generate substantial revenues by utilizing its territory and invested capital. Therefore, the integration of transport infrastructure represents one of Azerbaijan's key challenges.

In 2017, Azerbaijan undertook a number of practical steps aimed at advancing cooperation in the transport and logistics sector. In April of that year, a joint venture was established between Azerbaijan Caspian Shipping Company CJSC and Kazakhstan Railways JSC to carry out freight transportation within the framework of the Trans-Caspian International Transport Route (TITR). In June 2017, during a meeting of the TITR corridor participants, a Memorandum of Cooperation was signed with the China Transport and Communications Association. Subsequently, in February 2018, a Memorandum of Cooperation was concluded between Azerbaijan Railways CJSC and the China Railway Bridge Construction Corporation.

A major milestone in this direction was the inauguration of the Baku-Tbilisi-Kars (BTK) railway on 30 October 2017 [20]. The commissioning of the BTK railway widely regarded as one of the most significant regional projects of the twenty-first century created a key junction between East and West, transforming Azerbaijan into a geoeconomic pivot in the region. This route became one of the most important corridors for transporting Chinese goods to Europe. Chinese companies were actively involved in infrastructure projects implemented in Azerbaijan, including the construction of the BTK railway. China attached particular importance to Azerbaijan in the implementation of the Belt and Road Initiative. As early as 2017, Chinese companies were participating in 12 projects carried out in Azerbaijan.

By the late 2010s, 113 companies with Chinese investment were operating in Azerbaijan in sectors such as agriculture, communications, services, and transport. Cooperation was particularly extensive in the transport and energy sectors. At the same time, Azerbaijan encouraged the redirection of Chinese investments toward the non-oil sectors of the economy. The establishment of Azerbaijan's Trade Representation in Beijing served precisely this purpose. The main areas of activity of this representation included promoting the "Made in Azerbaijan" brand in China, attracting Chinese investments into the Azerbaijani economy, and protecting the interests of Azerbaijani companies operating in China.

At the beginning of the twenty-first century, China having become the world's second-largest economy and the largest trading nation began to rapidly expand its global economic presence while pursuing an external economic and trade policy distinct from that of Western liberal democracies. Within a relatively short period, China succeeded in becoming a dominant economic power in certain countries and even entire regions, acting as a major trade partner, investor, or creditor. However, in some countries and regions, the scale of China's economic engagement has been overstated by experts and has, in reality, remained rather limited.

Following China's accession to the World Trade Organization in December 2001, its trade with countries around the world expanded rapidly, a trend that was also reflected in the intensification of trade with the South Caucasus states. According to Chinese customs statistics, between 2001 and 2020 China's trade turnover with the region increased from USD 25 million to USD 3.7 billion. Nevertheless, in the early 2020s China's position among the region's largest trading partners remained relatively modest. In 2020, despite being the world's largest trading nation and exporter, and the largest trading partner of more than 130 countries, China ranked only as the fourth-largest trading partner of all three South Caucasus states, including Azerbaijan, after the EU, Russia, and Turkey.

Although some progress was achieved in mutual trade during the first two decades of the twenty-first century, China and the South Caucasus states made limited advances in investment cooperation over the same period. China's investment activity in the region remained relatively low. According to official Chinese statistics, between 2014 and 2019 the total volume of China's foreign direct invest-

ment (FDI) in the South Caucasus did not exceed USD 700 million annually. Based on official statistics, both Chinese and national data from the South Caucasus states, China's investments in Armenia and Azerbaijan remained modest.

China's investments in Azerbaijan were concentrated primarily in the oil sector. For example, the Chinese company CNPC has been operating in Azerbaijan since 2002. In that year, through its subsidiaries, CNPC acquired a 30% stake in the Kursangi-Garabaghli oil field and a 50% stake in Salyan Oil Ltd. for USD 52 million. In 2003, CNPC obtained a 31.41% stake in the development project of the Gobustan oil field (Cohen, 2017).

In addition to the oil sector, Chinese companies invested more than USD 30 million in trade, export support, and after-sales services in Azerbaijan. Various small Chinese private enterprises and individual traders were also active in the country, including restaurants, retail outlets, storage and processing facilities, and other businesses. However, compared with investments from other foreign countries, the overall volume of China's investments in Azerbaijan's oil industry remained relatively modest.

From the early 2020s onward, the situation began to change gradually. In April 2019, within the framework of the Second Belt and Road Forum for International Cooperation held in Beijing, Chinese and Azerbaijani companies signed ten investment agreements with a total value of USD 821 million. These agreements included the construction of a tire manufacturing plant in the Sumgait Chemical Industrial Park with the China National Electric Engineering Corporation (CNEEC) expected to acquire a 90% stake in the USD 300 million project as well as the construction of a greenhouse complex in the Kurdamir district and agro-industrial parks in the Quba, Goychay, and Khachmaz districts of Azerbaijan. In addition, the parties signed an agreement on the establishment of an Asia–Europe telecommunications corridor under the initiative of the Azerbaijan Digital Hub, aimed at organizing the annual transit of 2,500 containers through Azerbaijani territory along the Trans-Caspian International Transport Corridor (Azerbaijani and Chinese companies in Beijing sign contract worth $821 million, 2019).

It is important to note, however, that not all of the ten signed agreements were implemented, despite their official announcement. Many of the investments promised by Beijing, including those related to the Belt and Road Initiative, did not materialize in the region, and a significant number of the announced joint projects remained at the planning stage.

In recent years, the Government of Azerbaijan has made substantial investments in infrastructure projects along the Trans-Caspian Transport Corridor. Key investment projects have included the construction of the new port in Alat, the Baku-Tbilisi-Kars railway, and the rehabilitation of the E-60 highway between Baku and Ganja, extending further to the Georgian border; these projects have been successfully completed (South Caucasus and Central Asia: Belt and Road Initiative Azerbaijan Country Case Study, 2020).

Overall, during the past two decades, 21,000 kilometers of roads have been constructed and rehabilitated in Azerbaijan, along with 335 bridges and interchanges, 45 tunnels, 163 overpasses and underpasses, more than 1,500 kilometers of new railways, and the repair of 1,800 kilometers of existing railway lines (Ilham Aliyev was interviewed by China's Xinhua News Agency, 2025).

It is well known that in recent years the Government of the People's Republic of China has put forward numerous initiatives aimed at strengthening the global economy. Acting in line with its national interests, the Republic of Azerbaijan has been among the countries supporting these initiatives and has actively participated in related projects. Azerbaijan became one of the founding members of the Asian Infrastructure Investment Bank (AIIB) established at China's initiative. As early as 2019, ahead of his official visit to the PRC, President of the Republic of Azerbaijan Ilham Aliyev, in an interview with China's state news agency Xinhua, invited Chinese companies to increase investments in Azerbaijan's industrial production, information technologies, agriculture, and several other sectors.

Owing to the positive dynamics in bilateral trade, trade turnover reached USD 2.18 billion in 2019, while imports from China to Azerbaijan increased by 40%. As a result, Azerbaijan became China's

largest trading partner in the South Caucasus. In 2018, the Trade Representation of the Republic of Azerbaijan in the PRC began operating, and Azerbaijani Trade Houses were opened in the Chinese cities of Urumqi, Lanzhou, and Shanghai. Azerbaijan has organized trade missions to various regions of China. Chinese companies participate in the implementation of industrial projects in Azerbaijan, and Chinese ICT companies also operate successfully in the country.

At the same time, it should be noted that, overall, China has not yet participated as a major investor or creditor in transport infrastructure development projects in the South Caucasus. This stands in sharp contrast to China's high level of activity in transport infrastructure development in other developing regions such as Central Asia, Africa, Southeast Asia, and Latin America. In Azerbaijan, for example, most infrastructure projects have been financed not by China, but by the Azerbaijani government or by international development banks such as the World Bank, the European Bank for Reconstruction and Development (EBRD), the Asian Infrastructure Investment Bank (AIIB), and the European Investment Bank (EIB).

To date, the South Caucasus countries have exercised caution in borrowing from China when implementing national and regional infrastructure projects. Unlike many developing countries and particularly some Central Asian states with significant debt exposure to China the level of debt owed by South Caucasus countries to China remains relatively low.

In subsequent years, the steps taken by both states in this direction led to an elevation of existing relations to a higher level, in line with the interests of the Azerbaijani and Chinese peoples.

Within the context of expanding economic cooperation between the two countries, the modernization of railway and maritime infrastructure undertaken by the Republic of Azerbaijan has been of particular importance. In this regard, special mention should be made of the commissioning, in May 2018, of a new international port on the Caspian Sea with an annual cargo handling capacity of 15 million tons, which can be expanded to 25 million tons if necessary. The Baku-Tbilisi-Kars (BTK) railway line, connecting Asia and Europe, represents the shortest transport route for cargo shipments from China to Europe and back. In 2018 alone, 19 freight trains were operated via the BTK railway, and cargo volumes increased significantly in subsequent years.

Making use of its favorable geographical location including its position along the historic Silk Road the Republic of Azerbaijan has declared as a strategic objective its transformation into one of the key international transport hubs by attracting substantial investments into the infrastructure and transport sectors. Both the East-West and North-South transport corridors pass through Azerbaijan's territory. Azerbaijan actively participates in both projects and has put forward a number of initiatives in this regard.

At the Second Belt and Road Forum for International Cooperation, held in Beijing in April 2019, Azerbaijan's role and significance in the implementation of the proposed initiatives were once again reaffirmed. The realization of these initiatives has also made an important contribution to the development of economic cooperation between countries and regions, as well as to the promotion of stability and security. The project serves noble objectives such as strengthening intercultural and inter-civilizational relations, enhancing economic development, fostering national prosperity, and promoting people-to-people contacts.

The cautious approach of South Caucasus countries toward borrowing from China is one of the reasons for China's limited participation in the region's infrastructure projects. Another reason is that, for Beijing, the Trans-Caspian Transit Corridor does not rank among the primary or priority transit routes and plays a secondary role within the broader system of transit corridors linking China with Europe. China views it not as an alternative to the New Eurasian Land Bridge or the China-Mongolia-Russia corridor, but rather as a complementary route. Russian expert K. I. Tasits attributes the low volume of Chinese lending to the region to the limited activity of Chinese financial institutions, which prefer to avoid assuming binding financial obligations.

According to data from the State Statistical Committee of the Republic of Azerbaijan, in 2024 the People's Republic of China ranked fourth among Azerbaijan's main trading partners (in thousand USD), following Italy, Turkey, and Russia, and for the first time became Azerbaijan's largest source of imports. Total trade turnover with China amounted to USD 3,744,754.1 thousand (7.9% of total foreign trade turnover), imports reached USD 3,725,054.1 thousand (17.7%), while exports totaled only USD 19,700.0 thousand (0.07%). As can be seen, the negative trade balance within total trade turnover was extremely high, reaching 99.5% (Azərbaycan rəqəmlərdə, 2025, p. 172).

The volume of commodity turnover between Azerbaijan and China increased by 20.7 percent in 2024 compared to the previous year, reaching USD 3.744 billion. China also emerged as the leading country in terms of imports, accounting for 17.69 percent of Azerbaijan's total imports. On November 24, 2024, the first freight train carrying Azerbaijani export goods was dispatched from Baku to China. Azerbaijani carpets, pomegranate juices, and other high-quality products have begun to secure a place in the Chinese domestic market.

The Intergovernmental Commission on Trade and Economic Cooperation between the two countries serves as an important mechanism for expanding bilateral economic relations, identifying promising areas of cooperation, and further strengthening them within a legal framework. By the end of 2025, ten meetings of the Commission had been held. At present, Azerbaijani trade and wine houses operate in several cities of the People's Republic of China, including Beijing, Shanghai, Urumqi, Qingdao, Chengdu, Nanjing, and Zhangjiajie. These institutions make a substantial contribution to the development of bilateral trade relations. In addition, the Azerbaijan Trade House has been established on China's well-known international online trading platform, "JD."

Currently, 375 companies with Chinese capital are registered in Azerbaijan, of which 298 are actively operating in the country. Negotiations are underway regarding the prospects for joint cooperation between Azerbaijan and China in attracting foreign direct investment in the non-oil sector, particularly in high technologies, innovation, and alternative and renewable energy.

Today, the Baku-Tbilisi-Kars railway, the North–South International Transport Corridor, and the Trans-Caspian International Transport Route (the Middle Corridor), as well as the Port of Baku, one of the largest ports on the Caspian Sea, open new prospects for realizing economic and transport opportunities within the framework of the Belt and Road Initiative. The Middle Corridor is a reliable and secure route connecting Europe and Central Asia with China via the Caspian Sea and represents the most optimal pathway for transporting goods between China and Europe in both directions. Its significance is rapidly increasing. In 2024, the volume of transit cargo transportation between Azerbaijan and China amounted to 378 thousand tons, representing an 86 percent increase compared to 2023. During 2024, a total of 287 route trains were dispatched from China to Azerbaijan under export and transit regimes via the Middle Corridor (Ilham Aliyev was interviewed by China's Xinhua News Agency, 2025).

On July 3, 2024, at the 24th Summit of the Shanghai Cooperation Organization (SCO) held in Astana, the President of the Republic of Azerbaijan, Ilham Aliyev, and the President of the People's Republic of China, Xi Jinping, signed the "Joint Declaration on the Establishment of a Strategic Partnership between the Republic of Azerbaijan and the People's Republic of China." The Declaration envisaged the further expansion of cooperation, the strengthening of mutual interaction on international issues, and the joint promotion of regional and global peace, stability, and development. The document emphasized that bilateral relations would be developed on the basis of mutual respect, equality, trust, mutual support, mutual benefit and cooperation, respect for sovereignty and territorial integrity, non-interference in internal affairs, and the principles of peaceful coexistence (Joint Declaration of the Republic of Azerbaijan and the People's Republic of China on the establishment of a strategic partnership was adopted in Astana, 2024).

This Declaration, which opened a new chapter in Azerbaijan-China relations, elevated the two countries to the status of official strategic partners. In subsequent years, the development of cooperation across all sectors has become one of the key directions of Azerbaijan's foreign policy. The regular holding of high-level meetings and mutual visits in recent years serves as clear evidence of this trend.

Table 1

Trade Turnover, Exports, and Imports between the Republic of Azerbaijan and the People's Republic of China (2019-2024), million USD

Year	Trade Turnover	Exports	Imports
2019	2 184 194.00	752 162.63	1 432 031.37
2020	1 846 585.02	432 760.54	1 413 824.48
2021	1 780.69	141.15	1 639.54
2022	2 159.05	72.06	2 086.26
2024	3744754,1	19700,0	3725054,1

Source: State Statistical Committee of the Republic of Azerbaijan

Azerbaijan attaches great importance to the activities of the SCO, in which China plays a leading role, and actively participates in its work. In 2016, Azerbaijan became a dialogue partner of the SCO and is considered an important member of the SCO family. It was at the SCO Astana Summit that the strategic partnership between the two countries was established. China, which chaired the SCO in 2024–2025, hosted the 25th meeting of the Council of Heads of State of SCO member countries in 2025. China's chairmanship under the slogan "Promoting the Shanghai Spirit: SCO in Action" contributed to the institutionalization of the organization and the further strengthening of its role in the international arena. Azerbaijan currently holds the status of SCO dialogue partner. Cooperation between Azerbaijan and the SCO covers issues such as combating terrorism, extremism, and separatism, ensuring regional security and stability, promoting intercivilizational dialogue, multiculturalism, and tolerance.

China and Azerbaijan, as important members of the Global South, also closely cooperate on multilateral platforms. Azerbaijan chaired the Non-Aligned Movement, the second largest international organization after the United Nations, from 2019 to 2023. This organization represents approximately 80 percent of the world's population, around 50 percent of global GDP, and nearly half of total international trade.

During President Ilham Aliyev's official visit to the People's Republic of China in 2025, a number of important bilateral documents aimed at expanding Azerbaijan-China multilateral cooperation were signed. This visit had a positive impact on deepening the strategic partnership between the Republic of Azerbaijan and the People's Republic of China.

The outcomes of the 44-day Second Karabakh War (2020), which resulted in Azerbaijan restoring its sovereignty over its entire territory, created a new geopolitical and geoeconomic environment in the South Caucasus. The region has begun transforming from a zone of competition among major powers into an independent transportation, logistics, and energy hub. At the same time, each country in the region is independently determining its own development trajectory and adapting to the new conditions in its own way.

One of the most evident results of these regional transformations has been the strengthening of Azerbaijan's role as a key transportation hub. The development of the Middle Corridor, the modernization of transport infrastructure, and the enhancement of cooperation with neighboring states have significantly expanded the country's logistics capabilities. The irreversible nature of the peace process with Armenia has substantially increased Azerbaijan's investment attractiveness, particularly in infrastructure and energy projects. This trend has also been reinforced by the significant growth of the

non-oil sector's share in the country's gross domestic product. The launch of the Zangezur Corridor is expected to further enhance the region's logistical potential. Changes in the geopolitical orientations of Georgia and Armenia, along with the diversification of their foreign economic relations, are also encouraging them to seek new development models. Peaceful settlement and the reduction of regional tensions not only create opportunities for integration into new transport routes and reduce dependence on the Russian market, but also contribute to increased inflows of investment.

A significant milestone in the development of economic relations between the Republic of Azerbaijan and the People's Republic of China was the official visit of the President of the Republic of Azerbaijan, Ilham Aliyev, to China in April 2025 (this being his sixth visit to the PRC – K.I.). During the visit, the 18-point Joint Statement on the Establishment of a Comprehensive Strategic Partnership between the Republic of Azerbaijan and the People's Republic of China was signed. The document envisaged the expansion of cooperation not only in political, strategic, and humanitarian spheres, but also in the economic domain.

The parties agreed to strengthen the alignment of the "Belt and Road" Initiative with Azerbaijan's state development strategy on the "Revival of the Silk Road" and the Socio-Economic Development Strategy until 2030. They emphasized the need to enhance cooperation in trade, investment, green energy, and the digital economy, and decided to establish a Working Group on Investment Cooperation aimed at contributing to the high-quality development of bilateral trade and economic relations. The Joint Statement also expressed the intention to gradually expand mutual market access for environmentally friendly and high-quality agricultural products by jointly creating favorable conditions for the development of trade and economic relations. Furthermore, the parties agreed to initiate negotiations on a free trade agreement in order to ensure a high level of institutional guarantees for deepening cooperation in trade and investment.

Expressing their readiness to consistently deepen industrial cooperation and actively promote the digital transformation of industry, the two heads of state confirmed their support for strengthening and expanding commercial-based cooperation between enterprises in sectors such as petrochemicals, metallurgy, textiles, pharmaceuticals, and machinery manufacturing. They also declared their commitment to promoting the energy transition and sustainable socio-economic development of both countries, actively advancing cooperation in renewable energy, and jointly contributing to the formation of a global partnership in the field of clean energy.

The leaders of Azerbaijan and China highly assessed bilateral cooperation in the transport sector and reaffirmed their readiness to continue supporting the development of transport infrastructure, logistics, and the efficiency of freight transportation, while promoting regional connectivity. President Aliyev and President Xi Jinping welcomed the signing of the Agreement on International Multimodal Transport between the Governments of the Republic of Azerbaijan and the People's Republic of China. China expressed its readiness to cooperate with Azerbaijan and other countries along the route to establish secure, stable, and direct China–Europe–China Trans-Caspian express corridors, while consistently improving customs facilitation and the efficiency of cargo transportation.

China also reaffirmed its support for Azerbaijan's early accession to the World Trade Organization (WTO). The parties supported reforms of the international financial architecture to better reflect changes in the global economic order, advocated the liberalization and facilitation of trade and investment, opposed unilateralism, protectionism, despotism, and violations of global trade rules, and declared their joint commitment to defending the multilateral trading system for the sake of shared prosperity.

It was noted that Azerbaijan actively supports China's Global Development Initiative, Global Security Initiative, and Global Civilization Initiative, and is ready to join the "Group of Friends of the Global Development Initiative" in order to consolidate efforts to accelerate the implementation of the UN 2030 Agenda for Sustainable Development (Azerbaijan and China signed Joint Statement on Establishment of Comprehensive Strategic Partnership, 2025).

In early September 2025, the Shanghai Cooperation Organization (SCO) summit held in Yancheng with the participation of President Ilham Aliyev, as well as the military parade in Beijing marking the 80th anniversary of the end of the Second World War, demonstrated China's strong ambitions to transform into a major geopolitical and geoeconomic pole. Primarily through economic expansion, major technological breakthroughs, and the implementation of transport projects linking China with Europe, Beijing is positioning itself as a dominant Eurasian power and a key global actor in the formation of a new multipolar world order.

In 2025, China recorded one of the highest rates of foreign trade growth among the world's major economies, further consolidating its status as the world's largest trading nation. According to World Trade Organization data, China accounted for 14.5 percent of global exports and 10.5 percent of global imports. Rapid growth was observed in high-technology exports, including electric vehicles, 3D printers, and industrial robots. At the same time, China was at the forefront of green trade development in 2025, with its environmentally friendly products making a significant contribution to global climate action and the transition to green and low-carbon production in 2024. China has become the main trading partner for more than 150 countries, and the scope of its foreign trade partnerships continues to expand .

According to the General Administration of Customs of China, the country's total foreign trade volume in 2025 increased by 3.2 percent compared to 2024, reaching a record USD 6.35 trillion. China's exports rose by 5.5 percent to USD 3.77 trillion, while imports remained at the 2024 level of USD 2.58 trillion. By the end of 2025, trade turnover between China and countries participating in the Belt and Road Initiative increased by 5.7 percent to USD 3.298 trillion. At the end of 2024, China's total foreign trade turnover had grown by 3.8 percent to a record USD 6.16 trillion, with exports increasing by 5.9 percent to USD 3.577 trillion and imports by 1.1 percent to USD 2.585 trillion.

Among the countries experiencing particularly rapid growth in foreign trade with China is the Republic of Azerbaijan. According to Chinese Ambassador to Azerbaijan Lu Mei, bilateral trade turnover reached a record level in 2025. The high level of political relations between Beijing and Baku has been accompanied by sustained growth in trade and economic cooperation. Between January and October 2025, bilateral trade turnover reached USD 2.44 billion, representing an increase of more than 20 percent compared to the same period in 2024. This marks the third consecutive year of record performance. China remains Azerbaijan's largest source of imports and one of its key trading partners. Investment, economic, and technological cooperation between the two countries continues to deepen, with Chinese companies actively participating in Azerbaijani projects in industrial production, retail trade, automotive manufacturing, and the energy sector.

Cooperation between China and Azerbaijan in the field of renewable energy deserves particular attention. Chinese companies have signed contracts with the Azerbaijani side to implement five new energy projects with a total capacity of 1,570 MW, including solar and wind power plants. Once operational, these facilities are expected to double Azerbaijan's renewable energy generation capacity. Azerbaijan's first large-scale wind energy project with a capacity of 240 MW is planned to be commissioned in 2026 with the participation of Chinese companies. Following the abolition of the visa regime, mutual tourist flows have been steadily increasing. Between January and October 2025, the number of Chinese tourists visiting Azerbaijan exceeded 57,000, representing an annual increase of approximately 50 percent.

Alongside its economic model and possession of advanced weaponry, China seeks to affirm itself as one of the defining centers of global politics and the world economy. It also positions itself as a leader of the Global South, in which Azerbaijan is an active participant. As China's leading role in the contemporary geopolitical and geoeconomic landscape of Eurasia becomes more pronounced, Azerbaijan's role and position are likewise being reaffirmed. Azerbaijan constitutes a key link in the implementation of the Middle Corridor.

There is little doubt that the Middle Corridor passing through the Turkic states of Central Asia and Azerbaijan and extending via the future Zangezur Corridor (Trump Route, TRIPP) to Türkiye and further to Europe will become one of Eurasia's leading transport arteries. The key to this project lies in Azerbaijan, whose geopolitical and geoeconomic position was significantly strengthened following its decisive victory in the Karabakh War. This victory consolidated Azerbaijan's role as the leading power in the South Caucasus and granted it the status of a "middle power" in contemporary political thought.

The South Caucasus is increasingly being drawn into global processes of restructuring trade and transport routes, gradually transforming from a peripheral space into an independent element of Eurasian logistics and energy networks. However, the sustainability of this trend will depend on the effectiveness of economic policy and the ability to capitalize on emerging geoeconomic opportunities.

China's policy in the South Caucasus may, in several respects, be interpreted as an expression of "soft power." Educational and cultural programs implemented by China in the region serve as important instruments for advancing its geopolitical and economic interests.

Since gaining independence, Azerbaijan has also expanded humanitarian cooperation with the PRC, including in education, culture, and tourism. In recent years, humanitarian exchanges, particularly in language education and tourism, have intensified. Beijing Foreign Studies University has implemented Azerbaijani language programs, while interest among Azerbaijani students in learning Chinese has increased. The number of Azerbaijani citizens studying at Chinese and Azerbaijani higher education institutions at bachelor's, master's, and doctoral levels continues to grow. Chinese language courses are offered at several Azerbaijani universities in partnership with the Confucius Institute. Notably, centers for the study of Azerbaijani language and culture have also been established in China.

In 2024, Azerbaijan unilaterally introduced a visa-free regime for Chinese citizens in order to promote tourism development and business activity. Following the introduction of simplified visa procedures, tourist arrivals from China increased by 53 percent compared to the early 2020s. Chinese citizens may obtain visas at Azerbaijan's international airports. Regular direct flights between the two countries also play an important role in expanding economic relations.

Conclusion. The South Caucasus holds strategic importance for China as a land corridor connecting Central Asia with Europe. In this context, the Republic of Azerbaijan possessing economic, demographic, and geographical advantages over its neighbors has become a central element of China's regional strategy. This reflects not only the development of bilateral economic relations, but also growing political and institutional convergence. Azerbaijan's efforts to deepen integration with the Shanghai Cooperation Organization and its application to join BRICS demonstrate the multi-vector nature of its foreign policy (China expanding economic presence in South Caucasus, 2024).

China, with its ancient historical traditions and rich cultural heritage, has made significant contributions to the development of human civilization. As noted by Ilham Aliyev, in recent years, the People's Republic of China (PRC) has undergone remarkable development, achieving unprecedented success, particularly in the economic sphere. The world closely follows China's considerable achievements across various sectors (Ilham Aliyev was interviewed by Chinese Xinhua agency, 2019).

Political and diplomatic relations between the Republic of Azerbaijan and the People's Republic of China began following Azerbaijan's attainment of independence and have now reached their highest stage of development. Bilateral relations, founded on the principles of international law, sovereignty, territorial integrity, mutual benefit, and non-interference in each other's internal affairs, encompass nearly all areas of cooperation. Currently, expanding cooperation with the PRC, a country that has become one of the world's most powerful states in terms of economic development, fully aligns with Azerbaijan's national interests. Simultaneously, Azerbaijan, with favorable geopolitical conditions, strong economic potential, and a balanced, multi-vector foreign policy, has become one of the countries of significant importance for China's foreign political, cultural, and economic relations.

Agreements, contracts, and various forms of practical cooperation in transportation and logistics between the two countries indicate Azerbaijan's interest in participating in the Middle Corridor. However, experiences of some countries, including those in Central Asia such as Uzbekistan (The Risks of China's Loans to Uzbekistan, 2024), demonstrate that increased dependence on Chinese loans entails certain risks, including the threat of rising debt burdens. This could pose potential challenges to Azerbaijan's political and economic sovereignty in the future (China's Debt-Trap Diplomacy in Central Asia, 2024).

A comparative analysis of China's economic involvement in Azerbaijan relative to other economic actors in the South Caucasus demonstrates the limited engagement of China and Chinese companies in the country's economy. Chinese investment in Azerbaijan remains minimal and is primarily concentrated in the transport sector. Even in terms of trade relations, China does not occupy a leading position.

The expansion of Azerbaijan's relations with China encompasses both economic and geopolitical dimensions. In recent years, against the backdrop of political tensions with the EU and crises in relations with Russia, these ties have gained particular importance for the country. It is noteworthy that although the EU invested USD 24.7 billion in Azerbaijan between 2012 and 2023, investment activity in recent years has significantly declined. Nevertheless, Europe and Russia continue to be Azerbaijan's key partners in foreign economic relations, particularly in the energy sector. In contrast, China's presence in Azerbaijan has strengthened. One key reason for this is that political factors are largely secondary in economic relations. Notably, similar patterns are observed in Georgia's relations with the EU and China. Unlike these two republics, Armenia has not signed a strategic partnership agreement with China. Nevertheless, the Pashinyan government has expressed interest in expanding cooperation with China alongside the EU to reduce unilateral dependence on Russia, linking this approach to the necessity of pursuing a balanced, multi-vector foreign policy (Armenia looks to deepen ties with China while eyeing foreign relations beyond Russia, 2025; Chinese Companies Involvement in Major Infrastructure Projects in Armenia).

Azerbaijan is becoming a central element in the infrastructure, transit, and energy architecture emerging in the South Caucasus. It strengthens its status as a country that ensures the macro-financial stability of the region, facilitates technological and logistics connectivity, and sets long-term benchmarks for economic transformation.

Analysis indicates that, in the near future, alongside Turkey, Russia, and Europe, China will become one of Azerbaijan's most important economic partners and a significant factor influencing changes in the South Caucasus' geopolitical model. In a context where political and ideological factors remain secondary, the PRC is poised to be one of Azerbaijan's most attractive foreign investors (China and Azerbaijan: Geopolitical Prospects for Bilateral Relations in the Economic and Logistics, 2024). However, moving away from integration with Western political institutions and the existence of certain tensions with Russia create potential risks for strengthening China's monopolistic position in the region and in Azerbaijan. At the same time, the geopolitical dimension of Azerbaijan-China cooperation, as well as growing societal admiration for China's ideological and political model, increases the risk of distancing from democratic and liberal values. Growing potential dependence on Chinese investment may also pose certain threats to national sovereignty.

Azerbaijan's role as an Asia-Europe transport corridor, the negative trade balance with China, and the dominant position of inexpensive Chinese industrial goods in the domestic market may create potential economic risks in the future. Therefore, the most rational course for the Republic of Azerbaijan is to prevent debt dependence and maintain institutional sovereignty.

Unlike the Biden administration, the Trump administration has sought to develop more realistic and pragmatic relations with Azerbaijan. A clear example is the signing of a declaration on the normalization of Azerbaijan-Armenia relations in Washington on 8 August 2025 with the participation of D. Trump, as well as the commencement of works on the construction of the Zangezur Corridor

(Trump Route – TRIPP) through Zangezur. Nevertheless, given the tensions in U.S. relations with China, Iran, and Russia, efforts must be made to avoid being drawn into this conflict, which also carries certain risks for Azerbaijan and the South Caucasus.

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STATE POLICY OF IRAQ IN THE FIELD OF HYDRAULIC ENGINEERING STRUCTURES

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Abstract. The article attempts to analyze some aspects of Iraqi hydropower policy, examine major projects and institutional approaches, and outline challenges and ways to overcome them. It is noted that the period from 1970 to 1990 was the best period for the development of Iraqi water systems. As a result, Iraq's total electricity in 1987 was 8,538 MW. However, the 1990 Gulf War and subsequent events, especially the occupation of Iraq in 2003, interrupted this process. Three main regions of the country are indicated, where Iraq's hydropower projects are mainly concentrated. An analysis of their history allows us to conclude that they are not just engineering projects, but represent a strategic basis for the survival and development of the state, whose fate depends on the availability of water. It is noted that Iraq at this stage of development is faced with the need to reconsider its water priorities. In our opinion, the transition to more flexible water management will have a positive effect on the situation and will facilitate the efforts of the Iraqi authorities to reconstruct and modernize existing facilities. At the same time, the key importance of the foreign policy vector is emphasized, which implies reaching a comprehensive agreement with Turkey and Iran in the area of distribution of water resources in the Euphrates–Tigris river basin.

Key words: Iraq, hydroelectric power plants, hydroelectric power stations, dams, reservoirs, Mosul Dam.

Introduction. Iraq is a country with one of the world's oldest hydraulic civilizations, whose history dates back to the Sumerians and Babylonians. However, in the 21st century this civilization is facing unprecedented challenges such as political instability, transboundary redistribution of water resources, climate change, infrastructure degradation, and a lack of effective governance.

Modern Iraq's water policy is based on the operation of dams, reservoirs, and irrigation systems designed to provide energy, ensure water supply, support agricultural irrigation, and regulate flood control. However, a strategy centered on the construction and modernization of large hydraulic structures is becoming increasingly unsustainable under conditions of weak institutional systems, an intensifying resource deficit, and political fragmentation.

In recent decades, the geopolitical factor has become particularly significant. Since the sources of the Tigris and Euphrates rivers lie outside Iraq, in Turkey and Iran, the country finds itself in a highly vulnerable position with respect to the policies of its neighbors. The growing number of dams in the upper reaches of the rivers, declining precipitation, population growth, and the absence of international agreements on water balance have turned Iraq's water security into a serious regional conflict issue.

The purpose of this article is to analyze certain aspects of Iraq's policy in the field of hydraulic infrastructure, to consider major facilities and institutional approaches, and to outline challenges and possible ways of overcoming them.

Discussion. To begin with, Iraq was the first riparian country to develop engineering projects in the Euphrates–Tigris river basin. The Al-Hindiya and Ramadi-Habbania dams on the Euphrates were built in 1914 and 1951 respectively, both for flood control and irrigation purposes. However, the ecology of the river basin was fundamentally transformed when the riparian states entered the so-called "Era of Dams" in the late 1950s, which continues into the twenty-first century. In the 1950s, the Iraqi Development Board began planning irrigation and flood-control systems. Primarily, this was done to protect Baghdad, the capital, and other major cities from flooding. The first large dam (Dukan) was

constructed in 1959 on the Lesser Zab River; a hydroelectric power station of the same name has been operating there since 1979. This was followed by the implementation of other projects, during which many dams were built for irrigation and electricity generation.

Because of the presence of the Tigris and Euphrates rivers, Iraq was considered relatively rich in water resources compared to neighboring countries until the 1970s. However, in the 1970s–1980s the intensive construction of hydraulic structures in Turkey and Syria led to a sharp reduction in the water flow entering Iraq. The problem became especially acute after Turkey began implementing the grand Southeastern Anatolia Project (the so-called GAP project) in 1977, which envisaged the construction of 22 multipurpose dams and 19 hydroelectric power plants. The total storage capacity of these dams amounts to 138 billion m^3 of water from the two rivers. Full implementation of the project will make it possible to irrigate 17,103 km^2 of land with a total storage capacity of 100 km^3, which is three times greater than the combined reservoir capacity of Iraq and Syria.

The dam construction programs of Turkey, Syria, and Iran forced the Iraqi government to accelerate the construction of as many of its own hydraulic facilities as possible. Overall, the period from 1970 to 1990 was the best stage in the development of Iraq's water systems. As a result, Iraq's total electricity capacity in 1987 amounted to 8,538 MW, with the Qadisiyah–Haditha dam on the Euphrates producing 600 MW, the Mosul (then Saddam) Dam producing 300–400 MW, and the Dukan Dam producing 400 MW (Kliot, 1994, p. 121). Only the so-called 1990 Gulf War interrupted this process.

In general, dozens of medium- and small-capacity reservoirs, as well as a number of more or less large catchment dams, are scattered across Iraq. Three main regions of the country can be distinguished where Iraq's hydraulic structures are primarily concentrated:

1. The mountainous and hilly region of the governorates (muhafazat) of Dohuk, Erbil, Kirkuk, and Sulaymaniyah.
2. The region of the eastern valleys in the governorates of Diyala, Wasit, and Maysan.
3. The Western Desert region in the governorates of Anbar, Najaf, and Muthanna.

There are 17 dams in the northern regions, 5 in the eastern regions, and 11 small and medium dams in the Western Desert (Mukhalad et al., 2019, p. 283).

Irrigation projects include several categories such as dams, barrages, canals, drainage systems, pumping stations, regulators, and reservoirs. Iraq has six major operating dams, five of which are located in the Tigris basin and one in the Euphrates basin (Mukhalad & Al-Ansari, 2021, p. 35). In addition, a system was created on the Euphrates River to control flooding. This system includes the Ramadi Dam and Lake Habbaniya. Other systems on the Tigris River included regulators, canal systems, the Tharthar Lake project, and the Samarra Dam (Issa et al., 2013, p. 14618).

A relatively new use of dams is their capability to generate energy. For this purpose, dam reservoirs are used as storage basins for hydroelectric power plants (HPPs). Energy production and trade are relatively profitable uses of dams; therefore, most dams (and all major ones) are equipped with HPPs, even if their primary purpose is different. Iraq's hydroelectric power plants belong to storage-type hydraulic structures. In such HPPs, river water is stored in reservoirs during periods of high flow or when energy needs can be met by other power plants. When energy demand increases, or river flow is particularly low, the stored water can be released through HPP turbines to convert potential energy into electricity (Bremer, 2013, pp. 6–7).

The most critical problems faced by major reservoirs in Iraq include liquefaction in the foundations of the Mosul Dam, landslides and the consequences of earthquakes at the Derbendikhan Dam, as well as essential maintenance and rehabilitation requirements for almost all dams. Below, using several hydraulic structures as examples, we will consider the key trends in this area in Iraq.

As already noted, the first large dam built under the targeted program by the French company Dumez-Ballot was the Dukan Dam–the only large concrete arch dam in Iraq. The dam is a concrete arch structure set into limestone and dolomite rock, with gravity support blocks located in a narrow,

steep gorge. It is situated on the Lesser Zab River in the Dukan area, 65 km southeast of the city of Sulaymaniyah (Dokan and Derbendikhan Dam Inspections, 2006, p. 32).

As can be seen from the table provided, the largest dam in Iraq is the Mosul Dam. It is also the second largest dam in the Middle East and the only dam on the main course of the Tigris River in Iraq. The first studies regarding the construction of a dam in this area began back in 1953. Over a quarter of a century, geological surveys of the area were carried out for the development of the dam project, which was repeatedly revised. The very possibility of construction was often questioned, since gypsum formations beneath the proposed dam posed a serious safety risk.

Ultimately, a project proposed by a Swiss consulting company was approved, and in January 1981 construction began by a German-Italian consortium. The dam was inaugurated on July 7, 1986. The project consists of a main embankment 3,600 meters long, representing an earthfill dam with a clay core. The maximum height of the dam is 100 meters, and the operational level is 330 meters above sea level. The minimum operational level is 300 meters above sea level, below which the dead storage volume of the reservoir is 2.95 billion m³, and the useful storage volume is 8.16 billion m³.

The dam includes four Francis turbine power units on the right bank, with a total capacity of 750 MW, located at the foot of the dam, as well as two diversion structures. At full capacity, the facility holds about 11.1 cubic kilometers of water and supplies electricity to 1.7 million residents of Mosul. Construction of this hydraulic structure on a karst foundation with a clay core was completed in 1986. However, serious defects were discovered that very same year. Water leakage from the lower part of the dam body became particularly noticeable. Periodic collapses occurred, forming sinkholes, as it was revealed that the depth of the gypsum formations reached not 100, but 300 meters, making the structure highly vulnerable.

Despite repeated geological studies, the extent of gypsum dispersion and the degree of liquefaction in the dam foundations were not properly assessed. Bathymetric surveys of the Mosul Reservoir showed that its useful storage volume decreased from 8.16 to 7.597 billion m³, and its total storage volume decreased to 9.967 billion cubic meters (Mukhalad et al., 2019, pp. 114, 116).

Concerns about the instability of the structure led to large-scale restoration and rehabilitation work after the U.S. invasion of Iraq in 2003. In 2014, the dam was briefly seized by ISIS militants. After its liberation, the issue of the dam's foundation became a central topic in global media coverage. In 2016, Iraqi scientists and engineers sounded the alarm about the condition of the dam, as the risk of its collapse had increased catastrophically as a result of military operations. According to their forecasts, in the event of the dam's failure, vast territories, including the cities of Mosul and Baghdad, would be submerged, and more than one million people would die (Mosul dam engineers warn it could fail at any time, 2016).

After the defeat of ISIS, the Iraqi Ministry of Water Resources began restoring and rebuilding the destroyed sections of the facility and resumed the dam's maintenance program. In March 2016, a contract was also signed with the Italian company Trevi to perform grouting, preparation, and maintenance work on the dam. Repair work began in October 2016 and was completed in June 2019 (Mukhalad & Al-Ansari, 2021, pp. 40–41). The total cost amounted to 535 million USD, of which the U.S. government paid about 125 million USD and the Iraqi government 410 million USD. During this period, about 41,000 m³ of cement grout–equivalent to 26,700 tons of solid material–was injected into the ground (Mosul Dam rehab project wins award for work done deep in Iraq's conflict zone, 2022).

The Mosul Dam project staff, after undergoing relevant training under the guidance of foreign specialists, received qualifications enabling them to take responsibility for maintenance, grouting, and operation of the dam. Grouting operations are now carried out using a significantly modernized system. In addition, modern stations and equipment are used for preparing and pumping cement mixtures. Eighteen new drilling machines have been put into operation, 11 of which are electric and the rest diesel-powered. All operations are computerized (Al-Ansari et al., 2021, pp. 114–115).

The Haditha Dam is the only dam on the Euphrates River within Iraqi territory and is currently the second largest reservoir dam after the Mosul Dam. It is one of the most important and successful dams in terms of its role in controlling discharges on the Euphrates River, as well as the successful design and unique technical procedures adopted during its construction. The project for this dam was conceived in the late 1960s; construction began in 1977 and was completed in 1988. The dam embankment was designed by the "Hydroproject" Institute of the USSR Ministry of Energy, while its power station and equipment were designed and built by various Yugoslav companies (Adamo et al., 2018, p. 79).

The dam is located about 270 km northwest of Baghdad and about 14 km northwest of the city of Haditha. It is an earth-fill dam. Its length is 9,064 m; the crest width is 40 m, while the maximum base width exceeds 200 m depending on the riverbed elevation. The maximum height is 57 m from the deepest point of the riverbed, and the crest elevation is 154.00 m above sea level (Sissakian et al., 2022, p. 5). Among the Haditha Dam structures, the hydroelectric power station occupies an important place; it includes six Kaplan turbines with a total capacity of 570 MW. It is worth noting that the Haditha Dam currently faces serious operational difficulties due to the significant depletion of the Euphrates River flow (Al-Ansari et al., 2015, p. 16).

The Haditha Dam, with an area of 235,000 km², is the last reservoir on the Euphrates River within the cascade of dams that includes the Keban and Karakaya Dams in Turkey, as well as the Tabqa and Tishrin Dams in Syria. Compared to the Mosul Dam, the Haditha Dam has more successful projects and measures in terms of foundation treatment, particularly in overcoming the problem of karstification. The measures implemented at the Haditha Dam proved to be more successful than those achieved at the Mosul Dam (Mukhalad & Al-Ansari, 2021, p. 59).

In addition to the Haditha Hydropower Plant, several impoundment reservoirs (Al-Habbaniyah, Ar-Razzazah, etc.) and low-head barrage dams (Ar-Ramadi, Al-Fallujah, Al-Hindiya, etc.) have also been built on the Euphrates River, making it possible to supply water to irrigation canals.

The Duhok Dam, due to its location in Iraqi Kurdistan, is controlled by the authorities of the Kurdish autonomous region.

New spillway gates at the Derbendikhan Dam were installed between 1989 and 1990 after they were dismantled in 1988 due to the Iran–Iraq War. During the war, the spillway and substation were damaged by bombings. The power station was also damaged by airstrikes in 1990. In 2007, the World Bank launched a project worth USD 35.36 million to repair the Derbendikhan and Dukan dams. Repairs to the Derbendikhan Dam cost USD 18.85 million and were completed in 2013 (World Bank Group, 2015, pp. 1–3). At present, the Derbendikhan Dam and hydropower plant are under the control of the government of the Iraqi Kurdish autonomous region, which, in practice independently of Iraq's central authorities, determines both the future prospects of this facility and, in general, the hydropolicy of the territories under its control.

Recently, hydropower initiatives undertaken by Iran have also posed certain risks to this dam. The fact is that Iran has begun implementing a large-scale water project known as the "Tropical Water Project," which includes 14 dams and 150-kilometer diversion tunnels on the Sirvan and Zmkan rivers to transport water to rural areas in the south of the country. The total capacity of all planned dams is about 1.9 billion m³. As a result of the project's full implementation, approximately 77% of the natural catchment area of the Derbendikhan Dam will be lost (Rashid & Mohd Anuar, 2022, pp. 2704–2705).

Since 2000, there have been plans to build the Makhoul Dam on the Tigris River, with completion initially expected by 2007. However, the U.S. occupation of Iraq in 2003 resulted in the suspension of the project. Only in May 2021 did the Iraqi government resume construction of the Makhoul Dam and its hydroelectric power plant (with a capacity of 250 MW). This construction, scheduled for completion in 2026, is the largest infrastructure project in Iraq in the 21st century. It is expected that a water reservoir with a volume of three billion cubic meters will subsequently be created, where water can be stored for use during periods of drought and water scarcity.

However, construction is progressing very slowly due to the challenging terrain and lack of sufficient water. At the same time, the structural complexity of the facility increases economic costs. It should also be taken into account that the structure, like several other hydraulic facilities in Iraq, is located on gypsum layers, which leads to karstification of the subsurface and, consequently, increases the safety risks for the dam. The point is that there is a significant likelihood of gypsum dissolution, which in turn may cause water seepage into the ground (Abbas, 2022, pp. 5, 22).

Construction of this dam also threatens to flood nearby archaeological sites and displace populations in three administrative units between the provinces of Kirkuk and Salahaddin. Particular concern is associated with the possible flooding of the ruins of the city of Ashur (the capital of ancient Assyria), which is included in the UNESCO World Heritage List, as well as 184 other heritage sites. It will also cause large-scale changes in the fragile ecosystems of the Tigris River. Thus, the Iraqi authorities are forced to sacrifice values of the historical past in order to avoid a looming catastrophic future caused by the country's rapidly declining water resources. It is assumed that more than 3 billion cubic meters of water will be stored in this reservoir, mainly for irrigation purposes (Istepanian & Raydan, 2021).

It should be noted that three strategically important dams are located in Iraqi Kurdistan: Dukan, Derbendikhan, and Duhok, the first two of which provide 30% of Iraq's water reserves. The water strategy of the Kurdistan Regional Government focuses on the construction and reconstruction of dams, largely at the expense of downstream parts of the country. Since 2014, Kurdish officials have proposed adding 245 small dams and barrages on the province's rivers. In 2022, the KRG announced plans to build four major reservoirs, reportedly without any consultation with Baghdad. The KRG's water strategy risks increasing local tensions in Iraq (Hall & Harper, n.d.).

As already noted above, in addition to large hydraulic structures, dozens of small and medium reservoirs and dams are also in operation in the country. Below we have compiled a table reflecting the indicators of some of Iraq's small and medium-sized dams.

Table 1

Characteristics of Some Small and Medium-Sized Dams in Iraq (adapted from Mukhalad & Al-Ansari, 2021, pp. 60–64; Mukhalad et al., 2019, pp. 285–288)

Name and Location of the Dam	Type of Dam	Storage Capacity	Length and Height of the Dam	Date of Full Commissioning
Harava (Sulaymaniyah Province)		0.764 million m³	Length 115 m Height 22.5 m	2007
Azmar Valley Dams (Sulaymaniyah Province)				2006
Hasachay (Kirkuk Province)	Earth-fill embankment with a clay core	46.36 million m³	Length 2,360 m Height 58 m	2014
Kashkan (Duhok Province)		1 million m³	Length 270 m	
Shirin (Duhok Province)	Earth-fill embankment	1.325 million m³	Length 426 m	2008
Vand (Diyala Province)	Earth-fill embankment	37,82 млн м3	Length 1,342 m Height 24 m	2013
Belkana (Kirkuk Province)	Earth-fill embankment	0.89 million m³	Length 277 m	2013

Table 1 (continuance)

Shevasur (Kirkuk Province)		4.45 million m³	Length 333 m Height 26 m	2016
Bahiri (Kirkuk Province)		0.38 million m³	Height 18 m	
Mandalay (Diyala Province)	Earth-fill embankment	3.63 million m³	Length 1,315 m Height 14 m	2004
Shihabi (Wasit Province)		0.8 million m³	Length 275 m Height 9 m	
Dwairij (Maysan Province)	Concrete	1.87 million m³	Length 510 m Height 9.5 m	2015
Khusub (Najaf Province)		4.2 million m³	Length 1,050 m Height 11 m	2005 г.
Horan (Anbar Province)		4.9 million m³	Length 650 m Height 14 m	
Rutba (Anbar Province)	Earth-fill embankment	32 million m³	Length 848 m Height 19 m	1981
Al-Ubayla (Anbar Province)	Earth-fill embankment	4 million m³	Length 500 m Height 11.5 m	1973
Abyad (Anbar Province)	Earth-fill embankment	25 million m³	Length 448 m Height 20 m	2002
Um al-Tarfat (Anbar Province)	Earth-fill embankment	7 million m³	Length 990 m Height 11.6 m	1982
Shibayjah (Anbar Province)	Earth-fill embankment	8 million m³	Length 720 m Height 10.5 m	1977
Hussainiya (Anbar Province)	Earth-fill embankment	6 million m³	Length 512 m Height 13.25 m	1976
Al-Aghri (Anbar Province)	Earth-fill embankment	6 million m³	Length 525 m Height 11 m	1974
Rahalya (Anbar Province)	Earth-fill embankment	4 million m³	Length 440 m Height 13 m	1982

As can be seen from the information provided, a significant number of small and medium-sized dams were built in Anbar Province, in the so-called Western Desert. These structures generally do not include hydroelectric power plants and function as reservoirs within the framework of irrigation policy. From the very name of the region, it is clear that this part of Iraq is particularly deprived of precipitation and requires artificial irrigation. It is easy to notice that these dams were mainly built in the 1970s–1980s. Unfortunately, after 2003 the construction of such facilities in the Western Desert practically ceased.

Overall, negative trends can be observed with regard to Iraq's small and medium-sized dams. Some dams in mountainous and hilly areas have been partially or completely destroyed due to high waves. As a result of poor technical maintenance, sediment accumulates in the reservoirs, rendering them ineffective. Political instability and civil wars have also had an adverse impact on the condition of these structures.

A review of the history of the construction and operation of Iraq's hydraulic structures allows us to conclude that they are not merely engineering facilities but represent the strategic foundation for the survival and development of a state whose fate depends on access to water. Since the 20th century, dams, barrages, and hydroelectric power plants have become instruments of industrial and agricultural breakthroughs, energy security, and modernization across all spheres of public life. However, in recent decades these structures have come under pressure from numerous negative fac-

tors. The deteriorating hydrological situation–synchronized with climate change–the aging of infrastructure, political fragmentation, and the absence of coordinated international mechanisms for managing transboundary water resources not only neutralize the achievements of previous periods but also create fundamental problems that threaten the existential foundations of Iraqi statehood.

Conclusion. At the current stage of its development, Iraq faces the need to reconsider its water priorities. The strategy relying on large-scale construction of new dams has exhausted its potential. Instead, a shift toward more flexible water management is required, including the reconstruction and modernization of existing facilities, digitalization of monitoring systems, the introduction of water-saving technologies in agriculture, and the development of small and local water storage systems.

The foreign policy dimension remains key. Without a comprehensive interstate water agreement with Turkey and Iran that takes into account the interests of all parties, Iraq's efforts will have limited effectiveness. It is also necessary to strengthen the legal framework, establish decentralized water resource management systems, and involve local communities.

Iraq's experience clearly demonstrates that in the 21st century water becomes not only an economic resource, but also a socio-political one, requiring comprehensive, sustainable, and coordinated policies. Solving Iraq's water problem is simultaneously a matter of national security, regional stability, and human survival amid the global climate crisis.

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WASHINGTON DECLARATION OF AUGUST 8, 2025: TARGETS AND SIGNIFICANCE IN THE FUTURE SCENARIO OF THE SOUTH CAUCASUS

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Abstract. The article first of all notes the importance of the South Caucasus from an economic and strategic point of view. However, it discusses the conflicts existing in the region and the mechanisms for their resolution. It also assesses the important aspects of the region for the United States. The US policy in the South Caucasus is reviewed and the policy it has implemented in resolving the Armenia-Azerbaijan conflict is studied. The analysis of the Washington Declaration, which plays an important role in the political life of the South Caucasus, constitutes the main thrust of the article. The article reflects the provisions mentioned in the declaration. It also analyzes the assessment of the declaration for regional and non-regional states. The importance of the Washington Peace Declaration for Azerbaijan and Armenia, which are the main subjects of the declaration, is comprehensively examined. The attitudes of Russia, Iran and Türkiye to this declaration are objectively assessed. However, the roles that the declaration will play in the future development of the South Caucasus, if implemented effectively, have also been clearly defined.

Key words: South Caucasus, Armenia-Azerbaijan conflict, USA, regional security, Peace Declaration, integration.

Introduction. The South Caucasus traditionally occupies an important place in geopolitics and the global economy due to its strategic location and rich natural resources. From the point of view of the United States and other leading world powers, the stability of the region is of key importance for ensuring regional and global security. However, for many years the region remained a source of tension due to unfinished conflicts, in particular, the Armenian-Azerbaijani conflict, as well as a multitude of geopolitical interests intersecting between various world players, including Russia, Turkey and Iran. In this regard, the key issue in the South Caucasus is the search for sustainable mechanisms to resolve existing conflicts and create conditions for further political and economic development of the region.

In this context, the Washington Declaration, signed on August 8, 2025, attracts special attention. This document, which has become an important stage in the diplomatic efforts of the United States, not only establishes a new stage in the settlement of the Armenian-Azerbaijani conflict, but also has serious consequences for the future of the entire region. The article is aimed at analyzing this declaration in terms of its significance for the South Caucasus, assessing it both inside and outside the region, as well as examining its impact on the political and economic dynamics in Azerbaijan and Armenia, as well as the reactions of Russia, Iran and Turkey.

The geostrategic position of the South Caucasus, its rich natural resources, and its location on transport corridors are factors that increase its role in contemporary world politics.

The purpose of this article is a comprehensive analysis of the Washington Declaration of August 8, 2025 and its significance for the future development of the South Caucasus. The article will examine the impact of the declaration on the political and economic processes in the region, as well as its role in the settlement of the Armenian-Azerbaijani conflict. Special attention is paid to the reaction of regional and extra-regional States to the declaration, as well as forecasting its possible consequences for the security and integration of the South Caucasus into the international system.

Results and discussion. The South Caucasus plays an important role in the East-West, North-South energy and transport corridors. Another reason for the geopolitical importance of the South

Caucasus is its richness in natural resources. For this reason, in addition to regional states, global actors also show great interest in the South Caucasus region.

It should be noted that the United States established diplomatic relations with Armenia in January 1992, with Azerbaijan in March 1992, and with Georgia in April 1992.

The United States was not sufficiently active in South Caucasus politics until 1994. The main reason for this was the Armenia-Azerbaijan conflict and the South Ossetia and Abkhazia conflicts in Georgia (Isayev).

One of the factors that influenced the growth of US interest in the region was the discovery of new oil fields in the Caspian Sea. This played an important role in the implementation of US economic and energy projects in the region. As a result, the Baku-Tbilisi-Erzurum, Baku-Tbilisi-Ceyhan projects were implemented.

The South Caucasus and Central Asia region began to acquire special importance from a security point of view in US policy after the September 11 terrorist attack. Thus, Turkmenistan, Kazakhstan, Georgia and Azerbaijan gave the US the right to use their territories for military operations.

The importance of the South Caucasus region for the United States is due to the following factors:

• Geopolitical. The South Caucasus is of vital geopolitical importance due to its proximity to Russia, Iran, and the Middle East, as well as in the fight against Iran's nuclear program.

• Access to Central Asia. The South Caucasus' access to Central Asia plays a special role for the United States in terms of its policy in Central Asia and Afghanistan.

• Energy. The energy resources of the Caspian Sea serve the economic interests of the United States (Cornell).

The goals of the United States in the South Caucasus are as follows:

1) Ensuring the independence, sovereignty, and territorial integrity of the states of the region,

2) Developing the transport potential of the states of the South Caucasus for the effective transportation of the energy resources of the Caspian Sea,

3) Strengthening the economic development of the South Caucasus and developing relations between the states of the region and the transatlantic states,

4) Preventing the conflicts that exist in the South Caucasus,

5) Removing the region from the sphere of influence of Russia (Kuchins, Mankoff, 2016).

US President B. Clinton used the principle of "soft power" in his South Caucasus policy and was based on Kant's "democratic peace theory". The basis of this concept was the idea that democratic states should not go to war with each other. As a result, the US used institutions such as the National Democratic Institute, the National Democratic Institute for International Affairs, and the International Republican Institute in its policy (Khelashvili, Macfarlane, 2010).

In the policy of J. Bush, the principle of "hard power" was the main one. Thus, new oil and natural gas projects were discussed, and after the September 11 terrorist attack, the importance of the South Caucasus for the United States increased significantly.

B. Obama, on the other hand, used "smart power" during his term.

D. Trump did not pay special attention to the South Caucasus region during his term in office in 2017–2021. As a result, Russia's influence in the region increased.

During the presidency of J. Biden, the South Caucasus was one of the important points in US foreign policy. Thus, efforts were made to sign a peace agreement between Armenia and Azerbaijan within the framework of the Washington format.

However, D. Trump, who was re-elected as President of the United States in 2025, made new changes in foreign policy towards the South Caucasus.

Usually, geopolitical interests and processes in the South Caucasus were determined by 3 main factors:

1) Unresolved conflicts;

2) Caspian energy resources and their transportation;

3) Post-Soviet transformation, Western strategy to weaken Russia's influence.

An important turning point in the South Caucasus was the 2020 II Karabakh war.

The South Caucasus is characterized by a large number of conflicts. Various means, as well as the institution of mediation, were used to resolve existing conflicts in the South Caucasus. However, it was not possible to resolve the problems. One of the main problems was the Armenia-Azerbaijan conflict.

With Armenia's attack on Azerbaijani territory in the 1990s, 20% of our lands were occupied. Institutional means were used to resolve the conflict. In 1992, the OSCE Minsk Group was established. However, it was obvious that the Minsk Group could not solve the problem. Despite the organization of numerous meetings and the adoption of various documents, it was not possible to resolve the conflict. Thus, this group was not organized by neutral states. France always supported Armenia. Russia was interested in preserving the status quo and ensuring its leadership in the region. After the 2020 Patriotic War and the 2023 anti-terrorist operation, Azerbaijan ensured its territorial integrity.

On November 8, 2020, a trilateral peace declaration was signed between Russia, Azerbaijan and Armenia. The declaration stated the following:

1) Military operations should be stopped and the parties should stand by their positions.

2) Agdam should be returned to the Republic of Azerbaijan by November 20, 2020.

3) Peacekeeping forces of the Russian Federation should be deployed along the Lachin corridor.

4) In parallel with the deployment of peacekeeping forces, Armenian armed forces should be withdrawn.

5) A peacekeeping center should be established to monitor the ceasefire in the region.

6) The Kalbajar region should be returned to the Republic of Azerbaijan by November 15, 2020, and the Lachin region by December 1, 2020. Also, Russian peacekeeping forces should monitor the Lachin corridor (5 km wide).

7) Refugees and internally displaced persons should return to their homeland.

8) The process of mutual exchange of prisoners of war, hostages, and bodies should be carried out.

9) A transport and communication system should be established in the region. Also, the Republic of Armenia should guarantee the provision of secure connections with Nakhchivan and other western regions of the Republic of Azerbaijan. At the same time, a joint monitoring center was established by Russia and Türkiye to monitor peace in the region. Despite this, it has not been possible to fully establish peace in the region. Certain problems, namely the restoration of diplomatic relations, delimitation and demarcation of borders, have not been resolved.

Various solutions have been put forward in this direction, especially in the Moscow, Brussels and Washington formats.

President of the Republic of Azerbaijan Ilham Aliyev and Prime Minister of the Republic of Armenia Nikol Pashinyan have repeatedly stated their intention to sign a peace agreement. In fact, Armenia has recognized 86.6 thousand square kilometers of Azerbaijan's territory, and Azerbaijan has recognized 29.8 thousand square kilometers of Armenia's territory.

In this case, a question arises. What are the obstacles to the signing of a peace agreement between Armenia and Azerbaijan? The main obstacle has been the Armenian opposition, which lives with the fantasy of a great Armenia, and Russia. Because Russia knows that the signing of a peace agreement between the parties will undermine Russia's presence in the South Caucasus. Russia's main weapon has always been "divide and rule". With the signing of a peace agreement, there will be no conflict between the parties, and the status quo desired by Russia will be abolished, ending its mediation mission. Even though the US and the EU have repeatedly taken steps to sign a peace agreement between the parties in 2023, Russia has obstructed this process.

One of the important achievements of the United States in the South Caucasus region was the Declaration of Peace signed in Washington on August 8, 2025. US President D. Trump, President

of the Republic of Azerbaijan I. Aliyev, and Prime Minister of the Republic of Armenia N. Pashinyan signed the Declaration of Peace. The document noted the normalization of relations between the two states, the opening of transport routes, as well as the establishment of a direct connection between the territory of Armenia and Azerbaijan with Nakhchivan. The opening of the TRIPP (Trump Route for International Peace and Prosperity) corridor was reflected in the declaration (Goreck, 2025). In addition, the parties agreed to abolish the OSCE Minsk Group. Also, in accordance with the 1991 Alma-Ata Declaration, good-neighborly relations should be developed and mutual trust should be strengthened for peace in the region (Joint Declaration, 2025).

In addition, a Memorandum of Understanding was signed between the United States and Azerbaijan. The memorandum included the following:

1) Increasing economic investment;

2) Combating terrorism in terms of security cooperation;

3) Developing economic and trade relations;

4) Strengthening cooperation in the energy sector (Memorandum of understanding between the USA and Azerbaijan, 2025).

A Memorandum of Understanding was also signed between the United States and Armenia. The following points were reflected in the memorandum:

1) Increasing investment in the private sector;

2) Cooperation in the field of customs control and border security and the fight against smuggling;

3) Strengthening the exchange of experience between the US Security and the Armenian Border Guard;

4) Developing cooperation in the field of civil nuclear energy;

5) Strengthening cybersecurity (Memorandum of understanding between the USA and Armenia, 2025).

The Peace Declaration was welcomed by the Republic of Türkiye and the European Union. However, it was not well received by Russia and Iran.

The European Union should support the project and create effective conditions for peace. For this, the following steps should be taken:

1) The signing of the peace treaty should be facilitated;

2) The US participation in the fields of trade, energy, technology, and defense should be encouraged;

3) The influence of Russia should be reduced;

4) The normalization of Turkish-Armenian relations should be accelerated (Essen, 2025).

The important points of the Peace Declaration for the US are as follows:

1) The role of the US in the South Caucasus region is increasing.

2) Relations with Azerbaijan and Armenia are strengthening.

As we know, the Caucasus is of great importance for Russia.

1) The Caucasus is of great strategic importance. It connects Europe with the Middle East, and the Black Sea with the Caspian Sea.

2) The South Caucasus is rich in conflicts. The Armenia-Azerbaijan, South Ossetia, and Abkhazia conflicts have actually contributed to the strengthening of Russia's influence over the states of the region.

3) The South Caucasus is viewed by Moscow as a place of competition between Russia and the West.

4) The Caucasus is an ethnically diverse region. Russia believes that, according to the domino theory, the rise of any ethnic group in the South Caucasus will have an impact on the North Caucasus, so it is necessary to constantly monitor the region.

When approaching the Peace Declaration from the Russian context, the following conclusions can be drawn:

1) Russia has lost. According to the 2020 declaration, the Zangezur corridor would be controlled by Russian security forces. However, this could not be implemented. According to the 2025 declaration, the US will control TRIPP.

2) Armenia is moving away from Russia. Against the backdrop of the tension between Azerbaijan and Russia, Azerbaijan is also leaning towards the West.

The importance of the Caucasus for Iran is based on 4 main factors.

1) Cultural-historical, ethnic factors. Iran has deep historical and cultural ties with ethnic groups living in the Caucasus. Although these ties were not developed during the USSR, after the collapse of the USSR, these ties have taken an important place in Iran's foreign policy.

2) Economic factors. The Caucasus is of great importance in terms of connecting Iran to Russia and Europe. After the collapse of the USSR, energy issues and the strengthening of Iran's economic cooperation with the countries of the South Caucasus have come to the fore.

3) Political and security factors. Iran is a neighboring state of the Caucasus and cannot remain indifferent to the processes taking place there. Because the processes taking place in the region also affect Iran's security.

4) Legal status of the Caspian Sea. The Caspian Sea is within the interests of the Islamic Republic of Iran in terms of both economic and political-security. It is from this perspective that Iran does not accept foreign actors in the Caspian Sea.

Therefore, the negative aspects of this declaration for Iran are as follows:

1) Azerbaijan's connection with Nakhchivan through the territory of Armenia reduces Azerbaijan's dependence on Iranian territory.

2) The role of the West is strengthening in the region.

If we evaluate this declaration from the Georgian position, we can come to the following conclusions:

1) The pro-Russian ruling party Georgian Dream does not want the West to strengthen in the region.

2) Georgia's transit importance is decreasing.

How important is this declaration for Azerbaijan and Armenia?

For Armenia:

1) It is of great importance in terms of establishing peace in the region.

2) The TRIPP project, normalization of relations with Türkiye and an end to isolationism are being put in place.

3) Dependence on Russia is weakening, relations with the West are developing.

For Azerbaijan:

1) Relations with Türkiye are developing through the transit route. Also, the role of Azerbaijan as a trade center between Türkiye, Central Asia and China is being strengthened.

2) Economic and political relations with the US are being strengthened (Essen, 2025). Amendment 907 is being abolished.

Azerbaijani President I. Aliyev stated that naming the Zangezur corridor after D. Trump will accelerate its implementation and this project will be successful for the entire region. Armenia will also receive transit income. This declaration is very important against the background of the processes taking place in the world today. Thus, the Ukrainian war, Iran-Israeli conflicts and other problems create obstacles in the northern route and Red Sea communication lines. In such circumstances, stability in the South Caucasus plays a special role in ensuring effective connections between the European and Central Asian markets (The Washington Summit as a historic turning point for the South Caucasus, 2025).

The successes of the Peace Declaration are as follows:

1) It was a significant contribution to peace in the region. It is a necessary step towards the development of relations.

2) An agreement was reached on the dissolution of the OSCE Minsk Group.

3) It seriously damaged Russia's role in the South Caucasus.

However, certain problems remain. Thus,

1) This declaration is not a peace agreement. Diplomatic relations between Azerbaijan and Armenia have not been restored.

2) The claims to Karabakh in the Constitution of Armenia have not been eliminated.

3) No specific provisions were made regarding the EU mission on the Armenian border line in terms of the absence of a third party along the border.

In general, the future benefits of the Peace Declaration signed in Washington on August 8, 2025 for the region can be assessed as follows:

1) It will put an end to interstate hostilities.

2) It will accelerate humanitarian assistance and reconstruction work.

3) It will create conditions for strengthening regional economic integration.

4) It will be an important mechanism for ensuring the environment and infrastructure.

5) It will play a necessary role as a means of diplomatic pluralism.

Conclusions. The Washington Declaration of August 8, 2025 represents an important step towards stabilizing the situation in the South Caucasus. It outlines key principles and mechanisms for resolving long-term conflicts, especially the Armenian-Azerbaijani conflict, which opens up prospects for regional integration and economic growth. Nevertheless, the successful implementation of the declaration will require an integrated approach, including the active participation of international organizations, as well as flexible and far-sighted policies from both regional and non-regional actors.

The reactions of Russia, Iran, and Turkey show that the impact of the declaration will depend not only on its political and economic effectiveness, but also on the ability of the South Caucasus countries and external actors to forge a consensus conducive to lasting peace and stability. In the future, if the commitments are effectively fulfilled, the declaration can become the basis for creating solid foundations for peace and security in the South Caucasus, as well as serve as a catalyst for deeper integration of the region into international structures.

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THE RWANDAN CONFLICT THROUGH THE LENS OF REALISM: A SYSTEMATIC ANALYSIS

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Abstract. This study presents a systematic and in-depth analysis of the 1994 Rwandan conflict from the perspective of realist theory, a foundational approach in international relations scholarship. It seeks to explain the underlying causes of mass violence in Rwanda as well as the limited and delayed response of the international community by applying core realist concepts, including international anarchy, national interest, power politics, the security dilemma, weak statehood, and selective humanitarian intervention. By integrating insights from both classical realism and neorealism, the article evaluates the behavior of key international actors through a rational choice framework. Drawing on academic literature, the study situates its findings within the wider global academic discourse on conflict, genocide, and international responsibility.

Key words: realism, Rwandan conflict, genocide, national interests, security dilemma, international intervention, weak statehood.

Introduction. The termination of the Cold War marked a fundamental shift in the meaning and practice of security within the international relations system. With the erosion of the relatively stable balance of power sustained by bipolar rivalry, the incidence of large-scale interstate wars declined, while intrastate armed conflicts, ethnic violence, state collapse, and systematic human rights abuses increasingly occupied the center of the global security agenda (Brown, 1996; Fearon & Laitin, 2003). This transformation not only altered the empirical landscape of conflict but also subjected prevailing international relations theories to renewed scrutiny. In particular, liberal and normative approaches gained prominence in the post-Cold War era by foregrounding human rights, democracy, and humanitarian intervention as guiding principles of international politics. Yet the major humanitarian catastrophes of the 1990s-most notably Bosnia, Rwanda, Srebrenica, and later Darfur exposed a persistent gap between normative commitments and actual political behavior. These contradictions underscore the need to reassess the explanatory power of international relations theories, especially realism, in accounting for state behavior during humanitarian crises.

The 1994 Rwandan genocide stands as one of the most devastating humanitarian disasters of the post–Cold War period and, simultaneously, as a critical empirical case that reveals the structural constraints of the international system. Over the course of approximately one hundred days, more than 800,000 people were systematically killed despite the existence of early warning indicators, the presence of a United Nations (UN) peacekeeping mission, and widespread awareness of the escalating violence (Barnett, 2002; Power, 2002). Nevertheless, no effective international intervention was undertaken, and existing institutional mechanisms failed to generate a timely or decisive response. This outcome allows the Rwandan case to be interpreted not merely as a humanitarian tragedy, but as an analytical case that illuminates the underlying logic of international politics. In this sense, Rwanda vividly demonstrates the structural tension between normative aspirations and calculations of power and national interest, thereby offering a compelling empirical test for international relations theory.

This article argues that the Rwandan conflict and the 1994 genocide cannot be adequately explained either as the inevitable consequence of "ancient ethnic hatreds" or as a spontaneous and uncontrolled outbreak of mass violence. Instead, the genocide should be understood as the product of rational political strategies aimed at regime survival in a context of weak state institutions, combined with regime security imperatives and the anarchic structure of the international system. Within this framework,

ethnic identity did not constitute the primary cause of violence; rather, it functioned as an instrumental resource for political mobilization, legitimation, and the construction of existential threat narratives (Mamdani, 2001; Prunier, 1995).

Discussion. The existing literature on the Rwandan conflict generally falls into three broad analytical categories. The first emphasizes ethnic identity and historical antagonisms as the principal drivers of violence. The second, grounded in normative and humanitarian perspectives, interprets the failure of international intervention primarily as a moral or ethical failure. The third focuses on structural factors such as colonial legacies, socio-economic crises, and state weakness. While each of these approaches provides valuable insights, most struggle to integrate domestic political violence and international passivity within a single coherent theoretical framework (Barnett, 2002; Uvin, 1998). This article addresses this limitation by focusing on the interaction between weak state structures, regime security concerns, and international anarchy – an interaction that remains insufficiently theorized in existing research. In particular, systematic analyses that integrate classical realism and neorealism to explain both domestic and international dimensions of the Rwandan case remain limited.

The research gap identified in this study lies in the underdevelopment of realist explanations that conceptualize internal political violence and international selective passivity as outcomes of the same structural logic. Although the empirical and normative literature on Rwanda is extensive, few studies explicitly demonstrate this linkage within a realist analytical framework. By integrating classical realism and neorealism, this article contends that the dynamics of violence in Rwanda were governed by a consistent realist logic at both the domestic level through regime security and political mobilization and the international level through national interests and the selectivity of intervention. In doing so, the study reinforces the continuing analytical relevance of realism for understanding humanitarian crises in the post – Cold War international system.

From a theoretical standpoint, the analysis draws on the two principal strands of realism. Classical realism offers conceptual tools for understanding political behavior in terms of power, interest, and the preservation of authority (Morgenthau, 1948), while neorealism explains state behavior through the anarchic structure and systemic constraints of the international system (Waltz, 1979). The integration of these approaches enables a unified analytical framework capable of capturing both domestic and international levels of analysis. Methodologically, the study adopts a qualitative case study design, employing historical-institutional analysis, the systematic linkage of theoretical concepts with empirical evidence, and the comparative use of multilingual academic literature. This methodological strategy allows the Rwandan conflict to be examined not merely as a regional phenomenon, but as an analytically generalizable case for international relations theory.

Main Approaches to Explaining the Rwandan Conflict. The academic literature on the Rwandan conflict and the 1994 genocide constitutes one of the most extensive and theoretically heterogeneous bodies of work in the field of conflict studies. Scholars have approached the causes and dynamics of violence from multiple analytical levels, including historical legacies, social structures, normative frameworks, and systemic constraints. While this plurality has significantly enriched empirical understanding, it has also produced fragmented explanatory models, each with distinct strengths and limitations. As a result, the construction of a unified and coherent conceptual framework remains challenging. This section systematically reviews the main approaches to explaining the Rwandan conflict and evaluates their analytical capacity from a realist perspective.

One of the earliest and most widespread approaches explains the Rwandan conflict through ethnic confrontation and narratives of "ancient hatred." According to this view, deep-rooted historical antagonism between Hutu and Tutsi communities inevitably culminated in genocide. Such interpretations gained particular prominence in popular discourse and media accounts, which frequently depicted the violence as a spontaneous eruption of ethnic animosity. Academic scholarship, however, has subjected this primordialist interpretation to extensive criticism. Historical research demonstrates

that prior to colonial rule, the Hutu–Tutsi distinction did not function as a rigid or immutable ethnic divide, but rather as a fluid system of social classification linked to status, patron–client relations, and economic activity (Newbury, 1988; Vansina, 2004). Furthermore, ethnic determinist explanations fail to account for the highly organized, planned, and political character of the violence. The speed, scale, and coordination of the killings point not to spontaneous hatred, but to deliberate elite-driven mobilization and the instrumental use of state and para-state institutions (Straus, 2006). From a realist standpoint, ethnic narratives may help explain how violence was socially legitimized at the mass level, yet they remain insufficient for explaining why genocide occurred at a specific political moment and why it unfolded with such extreme intensity.

A second major explanatory framework situates the Rwandan conflict within the context of colonial governance and postcolonial state formation. Scholars working within this tradition argue that the modern political salience of ethnicity in Rwanda was largely produced through European colonial administration. Belgian colonial rule, informed by racialized theories such as the "Hamitic hypothesis," institutionalized ethnic hierarchies by portraying Tutsis as a natural ruling elite and Hutus as a subordinate majority, thereby hardening identity categories and embedding them within state institutions (Prunier, 1995; Mamdani, 2001). In the postcolonial period, this legacy contributed to a form of state legitimacy grounded not in inclusive citizenship, but in ethnic majoritarianism. Mamdani (2001) conceptualizes the Rwandan genocide as a continuation of the "internal logic of the colonial state," emphasizing that mass violence was structurally linked to state power and administrative practices. While this approach offers substantial explanatory value by connecting violence to political institutions and state structures, it is less effective in explaining the international dimension of the conflict, particularly why external actors failed to intervene despite early warnings and available information.

Another influential strand of scholarship foregrounds socio-economic conditions and the unintended consequences of development and reform policies. From this perspective, land scarcity, high population density, widespread poverty, and the social dislocations generated by structural adjustment programs created fertile conditions for violence (Uvin, 1998). Some scholars argue that development initiatives, rather than strengthening state capacity, exacerbated inequality and intensified political competition over scarce resources. These explanations are valuable for understanding the social foundations and enabling conditions of violence. However, they are limited in explaining why violence was actively promoted and organized by political elites, and why state institutions became instruments of mass killing. Socio-economic hardship is a common feature in many societies, yet it does not inevitably result in genocide. This suggests that additional political and structural variables-particularly elite decision-making and regime survival strategies-must be incorporated into the analysis.

A substantial portion of the literature interprets the Rwandan genocide primarily as a normative failure of the international community. Within frameworks centered on human rights, international law, and the doctrine of the Responsibility to Protect, the failure to prevent or halt the genocide is framed as a profound moral and ethical breakdown (Bellamy, 2010; Power, 2002). These studies powerfully document the moral costs and legal implications of international inaction. However, they provide limited analytical leverage for explaining why states failed to comply with their normative commitments. Liberal and normative approaches tend to evaluate international behavior in terms of what should have been done, rather than systematically analyzing why states, operating under conditions of uncertainty, risk, and competing interests, chose inaction.

Finally, a significant body of research focuses on the failure of the United Nations Assistance Mission for Rwanda (UNAMIR) and the selective conduct of major powers. Barnett (2002) emphasizes the dependence of international bureaucratic mechanisms on the political will of member states, arguing that the United Nations functions less as an autonomous actor than as a reflection of dominant state interests. Power (2002) highlights the reluctance of the United States and other major powers to employ the term "genocide," interpreting this avoidance as a strategic effort to evade legal and

political responsibility. While these analyses provide a detailed empirical account of international passivity, they require further theoretical integration-particularly with structural approaches such as realism-to explain why such patterns of selective inaction recur across cases of mass violence.

Taken together, these approaches illuminate important dimensions of the Rwandan conflict, yet none fully integrates domestic political violence and international passivity within a single explanatory framework. From a realist perspective, this gap underscores the need for an analysis that links weak state structures, regime security imperatives, and the anarchic nature of the international system. Such an approach enables the Rwandan genocide to be understood not merely as an anomaly or a moral failure, but as the outcome of rational political behavior operating within severe structural constraints.

The Distinctive Analytical Advantage of Realism. Each of the approaches reviewed above explains certain aspects of the Rwandan conflict; however, most of them fail to integrate internal political violence and international passivity within a single analytical logic. It is precisely at this point that realist theory offers a distinctive analytical advantage. Realism conceptualizes violence not as irrational hatred, but as a rational struggle for power, security, and interests (Morgenthau, 1948). Neorealism, in turn, links the behavior of international actors to the anarchic structure of the international system and the logic of self-help (Waltz, 1979). The integration of these two approaches makes it possible to demonstrate that both internal violence and international selective passivity in the Rwandan case were products of the same structural logic.

In this sense, realism does not reject ethnic or normative humanitarian explanations; rather, it systematizes the empirical insights they provide within a broader structural framework. This capacity enables the Rwandan conflict to be treated not merely as a unique tragedy, but as an analytically generalizable case for international relations theory.

Realism. The selection of realism as the primary theoretical framework for analyzing the Rwandan conflict in this article is deliberate rather than incidental. Realism offers a distinctive analytical capacity to explain both the logic of internal political violence and the selective, passive behavior of international actors within a single, coherent framework (Arı, 2014). By grounding its analysis in objective categories such as power, interest, and security rather than normative ideals realism is particularly effective in uncovering the structural drivers of severe humanitarian crises such as Rwanda.

At the ontological level, realism is founded on the assumption that the international system is anarchic. Anarchy signifies the absence of a central authority, compelling states to rely on their own capabilities to ensure survival and security (Waltz, 1979). This core assumption explains the persistence of power competition, balancing behavior, and mutual distrust in international politics. Epistemologically, realism approaches international affairs not from the standpoint of normative idealism what should happen but through observable behavior and structural constraints. The actions of states and political actors are understood primarily in terms of interest preservation and risk minimization rather than ethical intent (Morgenthau, 1948). This perspective is especially relevant for the Rwandan case, where the conduct of the international community was shaped less by humanitarian norms than by concrete political calculations.

Classical realism links both domestic and international politics to the human drive for power and the pursuit of interests. For Hans Morgenthau, political behavior is determined by objective national interests defined in terms of power (Morgenthau, 1948). This framework conceptualizes states and ruling elites as rational actors. In the Rwandan context, classical realism provides a powerful lens for explaining internal political violence. For governing elites, the primary concern is often not the abstract welfare of the state, but the survival of the regime itself. In the early 1990s, the increasing risk of power loss, military pressure from the Rwandan Patriotic Front (RPF), and the erosion of domestic legitimacy transformed violence from a last resort option into a preventive political strategy. From this perspective, mass violence appears not as an irrational emotional eruption, but as a rational choice aimed at preserving authority. Within this framework, ethnic identity functions not as

an ideological end, but as an instrumental means for political mobilization and the construction of an enemy. Classical realism facilitates an understanding of this instrumentalization by treating identity discourses as subordinate to political interests.

Neorealism. Neorealism, or structural realism, complements the state-centered and human-nature-based explanations of classical realism by emphasizing the constraining role of the international system's structure. According to Kenneth Waltz, the primary determinant of state behavior is not domestic political arrangements, but the position of states within an anarchic international system (Waltz, 1979). From this perspective, the behavior of international actors is shaped less by individual intentions than by systemic pressures and constraints.

The Rwandan case provides strong empirical support for neorealist logic. For major powers such as the United States and France, Rwanda did not represent a significant strategic or economic interest. As a result, humanitarian intervention was perceived as a high-cost and low-return endeavor (Mearsheimer, 2001; Power, 2002). In this context, international inaction emerges not as moral indifference, but as a rational outcome of interest prioritization within an anarchic system.

Neorealism also sheds light on the limited effectiveness of international institutions. Organizations such as the United Nations lack centralized authority, and their capacity to act is contingent upon the political will and resource commitments of member states. The weak mandate and limited resources of the United Nations Assistance Mission for Rwanda (UNAMIR) clearly demonstrated these structural constraints (Barnett, 2002).

A central analytical concept within realism-the security dilemma-helps explain how measures taken by one actor to enhance its security are interpreted as threats by others, thereby generating cycles of mutual distrust and escalating insecurity. This mechanism is particularly useful for understanding both the domestic and regional dimensions of the Rwandan conflict (Fearon & Laitin, 2003). Domestically, the military organization and battlefield successes of the RPF were perceived by the Hutu ruling elite as existential threats, accelerating radicalization and the normalization of violence. Actions taken to secure regime survival-including the formation of militias, the intensification of propaganda, and the expansion of repression-were interpreted by opposing groups as further threats, deepening the spiral of violence. At the regional level, the political and military mobilization of refugee communities in Uganda and neighboring states intensified mutual suspicion, transforming the Rwandan crisis into a broader regional security issue.

The theoretical framework outlined above generates several testable analytical expectations for empirical analysis. First, the intensity of violence in Rwanda should increase during periods of intensified internal political competition and heightened threats to regime security. Second, the likelihood of international intervention should be directly correlated with the national interests of major powers. Third, the effectiveness of international institutions should be constrained by political will and resource allocation. These expectations provide a basis for systematically examining the Rwandan case through a realist lens in the empirical analysis that follows.

The United Nations and UNAMIR. The United Nations Assistance Mission for Rwanda (UNAMIR) empirically reveals the structural limitations of international institutions. Owing to its restricted mandate, insufficient resources, and the absence of sustained political support, the mission proved incapable of preventing the escalation of violence (Barnett, 2002). From a realist perspective, this failure reflects not so much the institutional weakness of the United Nations itself as the lack of political will among major powers. The decision not to expand UNAMIR or to strengthen its mandate confirms that international institutions are not autonomous decision-making actors, but mechanisms dependent on the interests and preferences of their member states.

Empirical analysis further demonstrates that the intensity and scale of violence in the Rwandan conflict correspond closely with the predictions of the realist theoretical framework. At the domestic level, regime security concerns and rational-choice calculations stimulated violence, while at the

international level, the anarchic structure of the system and the prioritization of national interests effectively precluded intervention. In this sense, the Rwandan case empirically illustrates that realism possesses explanatory power not only for interstate wars, but also for intrastate armed conflicts and humanitarian crises.

The empirical and theoretical analysis conducted in this article demonstrates the high analytical value of interpreting the Rwandan conflict through the lens of realist theory. The findings both empirically reinforce the core assumptions of realism and demonstrate the continued relevance of this approach for explaining intrastate conflicts and humanitarian crises in the post–Cold War era. At the same time, the discussion acknowledges the limitations of realism and considers its potential complementarities with alternative theoretical perspectives.

One of the most significant findings is that realism enables internal political violence and international selective passivity in the Rwandan conflict to be explained within a single structural logic. While classical realism facilitates an understanding of ruling elites' behavior at the domestic level in terms of power, interests, and regime security, neorealism links international actors' avoidance of intervention to the anarchic structure of the international system and the primacy of national interests.

This integrative reading demonstrates that violence in Rwanda was neither merely an internal pathology nor the accidental outcome of international indifference. Rather, patterns of behavior observed at both levels represent different manifestations of the same realist logic. This finding weakens the common critique that realism can explain only interstate wars and empirically shows that it can also be applied to intrastate conflicts.

Comparison with Ethnic and Normative Approaches. The findings of this article further expose the limitations of ethnic and primordialist explanations. Empirical analysis shows that Hutu-Tutsi identity was not the cause of violence, but rather a political resource instrumentalized to implement it. This undermines the analytical validity of approaches that treat ethnic hatred as an independent variable. While ethnic explanations may partially account for how violence was socially legitimized, they are insufficient for explaining why it occurred at a specific political moment and on such a scale.

By contrast, normative humanitarian approaches tend to frame the Rwandan case as an ethical failure of the international community. While this perspective raises important normative questions, it struggles to explain at a structural level why states chose not to intervene. As demonstrated in this article, international passivity did not represent a rejection of normative values per se, but rather the prioritization of national interests and risk calculations. At this point, realism does not dismiss normative approaches, but instead provides a more fundamental structural framework for explaining their empirical outcomes.

An important dimension of the discussion concerns the relationship between realism and weak-state approaches. In weak states, institutions often function not as neutral mechanisms of governance, but as instruments in struggles for power a dynamic clearly observable in the Rwandan case. This article demonstrates that state weakness does not constitute an alternative to realism; rather, it represents a contextual condition that facilitates the empirical operation of realist logic.

In other words, weak state environments render the realist emphasis on power, interests, and survival instincts more visible. This perspective challenges the claim that realism applies only to strong states and shows that it also possesses substantial explanatory power in weak state contexts.

The failure of UNAMIR empirically supports neorealist critiques of international institutions. The findings indicate that, lacking central authority, international institutions cannot operate as independent actors and remain dependent on the political will of major powers. This challenges liberal institutionalist claims regarding the autonomous causal influence of international institutions. At the same time, it would be inaccurate to conclude that international institutions are entirely ineffective. Although UNAMIR failed to prevent genocide, debates surrounding its mandate and performance subsequently contributed to the development of international normative frameworks, most nota-

bly the discourse on the Responsibility to Protect. This, in turn, highlights a limitation of realism in explaining normative change.

While emphasizing the explanatory power of realism, this article also explicitly acknowledges its limitations. Although realism offers a robust framework for explaining the causes of the Rwandan conflict and international passivity, it tends to marginalize questions of ethical responsibility, normative obligations, and the role of international law. In cases such as genocide, an exclusive focus on structural logic risks obscuring issues of human rights and individual accountability. For this reason, a comprehensive understanding of complex humanitarian crises such as Rwanda requires realism to be complemented by constructivist, normative, and international legal approaches.

In conclusion, this article extends the empirical application of realist theory and strengthens its analytical potential for explaining intrastate armed conflicts. The Rwandan case demonstrates that preventing humanitarian catastrophes requires more than normative appeals alone; without addressing structural constraints and political interests, effective international responses remain unlikely. This conclusion carries important theoretical and practical implications. At the theoretical level, it reaffirms the continued relevance of realism in the post-Cold War era. At the practical level, it underscores the necessity of structural and political reforms within the international security architecture to enable more effective responses to humanitarian crises.

Conclusion. The analysis advanced in this article demonstrates that the 1994 Rwandan conflict represents a critical empirical case for evaluating-and reinforcing-the explanatory scope of realist theory in the study of violence and humanitarian catastrophe within international relations. The genocide in Rwanda cannot be satisfactorily explained either as the inevitable consequence of long-standing ethnic antagonisms or as a spontaneous and uncontrolled outbreak of mass violence. Instead, it must be understood as the outcome of the interaction between rational political strategies aimed at regime survival in a weak state environment, the dynamics of the security dilemma, and the structural constraints imposed by an anarchic international system.

One of the article's key findings is that the violence in Rwanda was not the result of internal political irrationality, but rather of calculated decisions taken under conditions of limited alternatives. For ruling elites, the overriding threat was the loss of political power and the attendant risk of physical elimination. Within this context, ethnic identity operated not as an ideological objective in itself, but as an instrumental resource for political mobilization and the legitimation of violence. This conclusion empirically substantiates core realist propositions concerning the primacy of interests and survival imperatives, extending their relevance to the analysis of intrastate conflict.

At the international level, the study shows that the behavior of the international community and major powers during the Rwandan crisis is more convincingly explained through a structural and interest-based logic than through interpretations focused exclusively on moral or ethical failure. In an anarchic international system, humanitarian intervention was pursued only when it coincided with the strategic or political interests of powerful states. Rwanda's marginal strategic and economic significance rendered large-scale intervention a high-cost and low-benefit option, thereby exposing the deep structural disjunction between normative rhetoric and political practice in international relations.

The failure of the United Nations Assistance Mission for Rwanda (UNAMIR) further illustrates the constrained autonomy of international institutions. The mission's limited mandate and inadequate resources reveal that the effectiveness of international organizations remains fundamentally dependent on the political will of member states. This outcome provides empirical support for neorealist critiques of international institutions and highlights the contextual limitations of liberal institutionalist claims regarding institutional independence.

The principal theoretical contribution of this article lies in its integrative application of classical realism and neorealism to demonstrate the structural linkage between internal political violence and international selective passivity. This integrative framework shows that realism is not confined

to explaining interstate war, but also offers substantial analytical leverage in the study of intrastate conflicts and humanitarian crises. In doing so, the article confirms the continued analytical relevance of realism in the post-Cold War era. At the same time, the analysis acknowledges the limitations inherent in realist theory. While realism provides a powerful account of structural causes and international inaction, it tends to marginalize considerations of ethical responsibility, normative obligation, and individual criminal accountability. A comprehensive understanding of complex humanitarian crises such as Rwanda therefore requires realism to be complemented by constructivist, normative, and international legal approaches.

From a practical perspective, the Rwandan experience demonstrates that normative appeals alone are insufficient to ensure effective responses to humanitarian emergencies.Without addressing structural constraints, political interests, and decision-making incentives, international interventions are unlikely to be timely or effective. This insight carries significant implications for the future design and reform of international security and intervention mechanisms.

In conclusion, the Rwandan case opens several avenues for future research. Applying realist theory to other cases of intrastate conflict and genocide may further enhance its generalizability. Examining the interaction between realism and normative approaches can help clarify the structural limits of humanitarian intervention discourse. Comparative studies of the relationship between regime security and mass violence in weak states may also generate valuable empirical and theoretical insights. Ultimately, the Rwandan conflict stands as a tragic yet analytically significant case, illustrating with particular clarity the predominance of power, interest, and security logics over humanitarian values in the contemporary international system.

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REFORMING THE LOCAL SELF-GOVERNMENT MODEL IN THE CONTEXT OF UKRAINE'S EUROPEAN INTEGRATION

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Abstract. The article explores the reform of the local self-government model in Ukraine in the context of European integration, emphasizing the shift from formal decentralization to real institutional capacity of territorial communities. The study analyses European approaches to strategic local development, municipal engagement in EU policies and programs, institutional capacity audits, and the implementation of the subsidiarity principle. Special attention is given to local development strategies, municipal offices of European integration, and capacity assessment as instruments for strengthening local governance and supporting post-war reconstruction. Drawing on EU practice and OECD and Council of Europe recommendations, the research argues for an integrated decentralization model that combines delegated competences with adequate financial, human and institutional resources. The findings highlight that alignment with European governance standards enhances sustainable territorial development, public service quality and Ukraine's integration into the European system of local and regional governance.

Key words: local self-government, European integration, institutional capacity, subsidiarity principle, political processes.

Introduction. Reforming the local self-government model in the context of Ukraine's European integration is a strategic process aimed at forming an effective, democratic, and capable system of local governance that meets European governance standards and the principles of subsidiarity, municipal autonomy, and public accountability. This process is based on transforming institutional foundations, improving the territorial organization of government, strengthening human resources, and modernizing mechanisms for financial support for communities. Of particular importance are strategic planning tools, digital transformation of municipal governance, expanding citizen participation in decision-making, development of inter-municipal partnerships, and integration into European platforms for municipal cooperation.

In the context of European integration, local government is considered not only an administrative structure but also a full-fledged subject of territorial development, capable of formulating local policies, implementing economic, social, environmental, and innovative projects, and ensuring the quality of life of the population. The governance model acquires features of service, network, and partnership, involving a balanced combination of public administration, public interaction,

and local initiative. The change in the role of local government is accompanied by the modernization of management approaches, the introduction of result-oriented budgeting tools, integrated spatial planning, e-government, municipal marketing and innovative Smart City technologies.

Research objective. The purpose of the study is to substantiate directions for reforming the local self-government model in Ukraine in the context of European integration by analyzing European approaches to strategic community management, institutional support for European integration processes, the assessment of the institutional capacity of local self-government bodies, and mechanisms for implementing the principle of subsidiarity. The study aims to develop practical recommendations for increasing the capacity of territorial communities and their integration into the European space for local and regional policy.

Methodology. The methodological basis of the study is a complex of general scientific and special methods of cognition. In the process of work, institutional and systemic approaches were used to analyze the model of local self-government as a component of a multi-level system of public administration. The comparative legal method was used to compare Ukrainian and European practices of municipal governance and to generalize the approaches of the European Commission, the OECD, the Council of Europe, and other international institutions.

The empirical basis of the study comprises analytical reports of international organizations, regulatory legal acts of the EU and Ukraine, materials from international technical assistance programs, and the practice of the European Union member states. Methodology also utilized the structural-functional method, elements of policy analysis, and a descriptive-analytical approach to form conclusions and recommendations.

Results. The reform of the local self-government model in Ukraine is gradually moving from formal decentralization to real institutional capacity of communities. Orientation to European standards involves the development of local democracy, transparent governance, accountability, public participation and ensuring a balance between community autonomy and state regional development policy. In the future, such a transformation will create conditions for strengthening municipal competitiveness, increasing investment attractiveness, forming sustainable territorial communities, and establishing the European model of local governance in Ukraine.

Strategic planning at the local level. The introduction of a model of strategic community management, with the mandatory development and implementation of a Local Development Strategy coordinated with the regional and national objectives of the EU Cohesion Policy, is one of the basic directions of modernizing local self-government in Ukraine. In EU practice, territorial development is planned through comprehensive, integrated strategies that combine spatial, economic, social and environmental dimensions and serve as the basis for attracting cohesion policy funds. The European Commission and the JRC emphasize that interventions in the development of territories should be based on local strategies that comply with the cohesion policy framework and ensure consistency between community, state, and EU goals (European commission, 2020).

The experience of EU Member States demonstrates that systematic strategic planning at the local level is becoming a condition for access to European funds. For example, in Poland, municipalities are developing commune development strategies, which are the basis for the selection of projects financed by cohesion policy funds in 2021–2027. The OECD, in its report on local governance in Poland, emphasizes that it is the ability of local governments to formulate and implement quality development strategies that determines the effectiveness of the use of EU investments and the impact on the well-being of residents (OECD, 2021).

Similar approaches are being promoted in Ukraine: international technical assistance programs (in particular, U-LEAD with Europe) emphasize that integrating rural development priorities and EU standards into community strategic documents allows for the systematization of local needs and opens access to a broader range of financial instruments (Volokhatyi, 2023).

For Ukraine, especially in the context of reconstruction, strategic community management acquires applied meaning; it is about the transition from "project thinking" to the full cycle of development management – from diagnostics and analysis of community potential, formation of vision and goals, definition of priorities and indicators to launching a portfolio of projects, monitoring and adjustment. The OECD, in its study on strengthening regional and municipal capacity in Ukraine, notes that communities with clearly formulated strategies are better able to attract investments, coordinate actions with state bodies more effectively, and demonstrate greater resilience to shocks. In this context, the recommendation to introduce a mandatory Local Development Strategy, consistent with regional strategies and the objectives of the EU cohesion policy, does not mean the formal appearance of yet another document, but the construction of a systemic management tool on which the quality of infrastructure restoration, human capital development, business attraction and donor resources depend.

Such a model can serve as a "framework" for the entire municipal policy; the community receives not a random set of projects but a logically ordered vision of development for the medium and long term. This creates the prerequisites for:

– coherence of decisions at the local, regional and national levels;
– transparent selection of priorities and projects to be financed;
– reasoned work with donors and international partners;
– systematic monitoring of results, not just the resources used.

At the same time, such a recommendation requires support: a standardized methodology for developing community strategies, staff training, digital monitoring tools, and precise requirements for harmonizing local documents with regional strategies, the State Strategy for Regional Development, and the priorities of the EU cohesion policy. Under such conditions, the Local Development Strategy becomes an effective tool for Ukraine's integration into the European space of regional policy, rather than a formal requirement.

Municipal offices of European integration of communities. The creation of municipal offices of European integration (Local EU Desks) within local self-government bodies should be considered a separate institutional tool for deepening community participation in European policies, programs, and cooperation networks. The idea of local "European offices" is also indirectly enshrined in the practice of EU institutions; the European Parliament's resolutions on enlargement and neighborhood policy emphasize the need to create local EU Desks and EU coordinators to strengthen administrative capacity at the local level and better interaction with EU institutions (European Parliament, 2020). A similar logic is demonstrated by the Eurodesk network, which operates through local information points in municipalities, youth centers, and NGOs in 36–37 European countries; these points act as intermediaries between the EU and communities, providing information on programs, opportunities, and financial instruments (Eurodesk, 2018).

For Ukraine, which is moving towards full EU membership, European integration offices at local government bodies can become a structure that:

– coordinates community participation in Interreg, URBACT, Erasmus+, Horizon Europe, LIFE programs;
– supports the preparation and implementation of grant applications;
– develops partnerships with twin cities and networks such as CEMR, PLATFORMA, UCLG Europe;
– ensures communication with the EU Committee of the Regions (CoR) and national associations of local governments.

The practice of CEMR demonstrates that at the European level, it is the national associations of local and regional authorities and their member municipalities that use specialized structures to work with the European agenda: monitoring policies, participating in legislative processes, coordinating international projects, and training officials (NALRGE, 2019). In the Ukrainian context, this

logic is already partially implemented through initiatives such as “Bridges of Trust” and the EU–Ukraine Municipal Partnerships Forum, which bring together Ukrainian and European communities to collaborate on reconstruction, exchange experiences, and support the EU accession process (VLex, 2026). In addition, the Committee of the Regions and programs such as TIPS4UA and the CoR–U-LEAD joint projects are creating institutional mechanisms for internships, training and partnerships for Ukrainian municipalities (EU Neighbors seast, 2025).

From the standpoint of applied analysis, it is advisable to consider the municipal office of European integration as a permanent coordination center rather than a temporary “project group”. Such an office can perform at least several functions:

– analytical and coordination, monitoring of programs, competitions, EU grant opportunities; preparation of analytical notes for community leadership; coordination of local projects with regional and national planning documents;

– project and grant, complete cycle of work with projects, from idea to reporting; formation of a portfolio of projects for cohesion policy and other funds;

– communication and diplomatic, development of networks of twin cities, participation in CEMR, CoR forums, European conferences of local authorities, support of the international image of the community;

– educational and consulting, training of municipal employees, interaction with business and the public sector on the use of European instruments, information work with youth according to the Eurodesk InfoPoints model.

The creation of such offices helps avoid the fragmented, episodic nature of community participation in European programs. In the absence of an institutional “entry point” into the European space, municipalities often depend on external initiators (donors, partners, consultants) and lose consistency in building a project portfolio. The European Integration Office makes this activity part of ongoing management practice, rather than a one-time activity. This, in turn, increases the predictability of development, strengthens the sustainability of partnerships, and lays the foundation for long-term community participation in the policy of cohesion and reconstruction of Ukraine in a European format.

Audit of the institutional capacity of communities. The introduction of a mandatory audit of institutional capacity in communities is a key element of modern European municipal policy, as institutional capacity determines local governments' ability to plan development, use resources efficiently, ensure the quality of public services, and attract external funding, including EU cohesion policy funds. In the countries of the European Union, the audit of municipal capacity is carried out not as a control intervention, but as a mechanism to improve the quality of management (quality management) and the strategic maturity of local authorities.

The European Commission and the OECD emphasize that a systematic assessment of the institutional capacity of communities should cover four key dimensions: organizational and managerial (governance), financial, digital and service. Such audit models are implemented through the CAF (Common Assessment Framework) (Eupan, 2026), the SIGMA/OECD (2026) Public Governance Review model, the Institutional Capacity Assessment (ICA) system (IDB, 2026) for EU regional policy, and the ISO 37120 (Sustainable Cities Indicators) (2018). The OECD report “Rebuilding Ukraine through Strengthening Regional and Municipal Governance” (2023) states that the audit of community capacity is becoming a prerequisite for their participation in reconstruction, international partnerships, and attracting donor funds.

Practical examples demonstrate that such audits have become mandatory in Poland (Local Government Capacity Index, LGCI) (World bank group, 2026), Estonia (Municipal Capability Assessment System) (World bank group, 2026), Lithuania (Institutional Resilience and Readiness Audit), and are also being implemented in Romania and Croatia to assess the readiness of municipalities to manage EU funds.

For Ukraine, the implementation of such an audit will mean a transition to a European model of governance, where each community does not merely have formal status but also demonstrates the real ability to manage the development of its territory. This is especially relevant in the context of post-war reconstruction, when donors and international organizations (USAID, GIZ, U-LEAD, CoE) support communities that can demonstrate their capacity through transparent assessment tools. A mandatory audit also creates a basis for municipal ranking, the formation of regional capacity maps and the identification of communities that require priority support.

The institutional audit will not be a punitive mechanism but a support tool. It will allow:

– to identify weaknesses in the resource management system;

– to identify needs for staff training and digital transformation;

– to form a strategy for increasing the competitiveness of the community;

– to increase the trust of the population, business and international partners.

The transition to a systematic audit practice will allow communities to act not reactively, but strategically, gradually forming a management model compatible with European standards of good governance, sustainable territory, and resilient municipalities.

Implementing the principle of subsidiarity. Improving the mechanisms for implementing the principle of subsidiarity involves not only the formal delegation of functions to local governments, but also their real ability to perform these tasks at the appropriate level. In European municipal practice, this principle is considered a comprehensive system that includes the transfer of powers, along with financial resources, management personnel, digital tools, and institutional support. After all, the transfer of functions without adequate resources turns decentralization into a mere declaration and does not strengthen the community's territorial capacity. The European Charter of Local Self-Government emphasizes that the scope of powers of local governments should be "adequate to their resources", and the state should provide an environment in which these powers can be implemented effectively (Articles 4, 9) (Oficijnij visnik Ukrayini, 2015). The Council of Europe's report on the evaluation of the implementation of the Charter in Central and Eastern European countries emphasizes that a mature subsidiarity model involves the transfer not only of functions but also of operational autonomy, human resources, and strategic planning mechanisms (Council of Europe, 2018).

The Polish experience shows that the local government reform after 1999 succeeded thanks to the so-called three-level subsidiarity package:

– administrative transfer of powers;

– consolidation of financial instruments (taxes, subventions, grants);

– training of managers and creation of institutional support through voivodeship development centers and municipal agencies. The OECD, in its report "Ensuring the effectiveness of decentralization" (2019), emphasizes that the effectiveness of decentralization depends on the extent to which local governments are provided with resources, not just rights.

Ukraine has already made significant steps towards primary decentralization, but the principle of subsidiarity is still partially applied. A significant number of communities have been given functions in the fields of education, medicine, urban development, and social policy, but are not provided with appropriate finances, professional staff, and technical means. There is a lack of institutional support tools, such as regional centers for municipal expertise, digital transformation or project management. This leads to communities being forced to rely on centralized solutions, which actually reduce territorial autonomy.

Improving the implementation of the subsidiarity principle in Ukraine requires the formation of an integrated approach, which includes:

– development of clear mechanisms for the transfer of powers together with regulatory financial sources (tax revenues, intermunicipal subventions, grant funds, property resources);

– creation of municipal training and consulting centers that will provide training for management personnel (based on the Polish, German, Estonian models);

– digital support for management and administration of services (e-government, GIS platforms, CRM for communities);

– formation of institutional models of cooperation between communities, especially in the fields of medicine, education, ecology, mobility, and waste management.

Subsidiarity should work not as a formal sign of decentralization, but as a practical mechanism that allows communities to truly manage development and not depend on constant political or financial intervention from the center.

Conclusions. The reform of the local self-government model in Ukraine in the context of European integration is a complex, multidimensional process aimed at transforming territorial communities into capable, autonomous, and development-oriented actors of public governance. The study demonstrates that the transition from formal decentralization to adequate institutional capacity requires the systematic implementation of European approaches to municipal governance, grounded in the principles of subsidiarity, strategic planning, institutional accountability, and partnership.

The analysis confirms that the introduction of mandatory local development strategies aligned with regional, national and EU cohesion policy objectives constitute a fundamental precondition for effective territorial development. Strategic planning enables communities to move from fragmented project-based activities to a coherent management cycle, strengthens coordination between different levels of governance and improves access to European financial instruments.

The establishment of municipal offices of European integration is substantiated as an effective institutional mechanism for deepening community involvement in EU programs, networks, and policy processes. Such offices contribute to the professionalization of project management, the development of international partnerships and the institutionalization of European integration at the local level.

The research also highlights the critical importance of introducing a mandatory audit of community institutional capacity as a tool to improve governance quality, ensure transparency, and enhance readiness for post-war reconstruction. European audit models demonstrate that capacity assessment should be oriented towards development and support rather than control, forming a basis for targeted assistance and evidence-based decision-making.

Furthermore, the study emphasizes that the effective implementation of the principle of subsidiarity in Ukraine requires not only the delegation of competences but also the provision of adequate financial, human and institutional resources. An integrated approach to subsidiarity strengthens territorial autonomy, reduces dependency on centralized decision-making and enhances the sustainability and resilience of local governance.

Overall, the findings confirm that the modernization of local self-government in Ukraine, grounded in European standards and practices, creates the necessary conditions for strengthening democratic governance, improving the quality of public services and ensuring sustainable territorial development. The proposed institutional and policy recommendations may serve as a practical framework for advancing Ukraine's integration into the European model of local and regional governance.

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THE RISE OF RIGHT-WING POPULISM AND SPREAD OF ISLAMOPHOBIA IN WESTERN COUNTRIES

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Abstract. Right-wing populism is one of the leading factors in the spread of Islamophobia in Western countries in modern times. Right-wing populism, as an ideology promoted by right-wing parties and movements, promotes forms of intolerance and discrimination such as racism, xenophobia, anti-Semitism, and Islamophobia. One of the main features of right-wing populism, which is widespread in Western countries, is Islamophobia.

The impact of right-wing populism on the spread of Islamophobia in Western society is reflected in the activities of right-wing political parties and movements. The article shows that Islamophobia is one of the main directions of the activities of right-wing political parties. The Islamophobic policies of right-wing political parties and movements not only strengthen their positions in society, but also lead to an increase in intolerance, discrimination and violence against Muslims.

Key words: right-wing populism, Western countries, Islamophobia, right-wing parties and movements, Muslim immigrants, migrant crisis, Great Recession.

Introduction. There is no consensus among researchers on the definition of right-wing populism, or populism in general. This point stems from the rather vague and broad content of the concept of populism. In his article "The Rise of Populist Extremism in Europe: What is Populism?", Turkish researcher Ayhan Kaya shows that scholars studying right-wing populism explain the essence of this phenomenon through the following characteristics inherent to it: anti-elitism, anti-intellectualism, and anti-establishment positions; affinity with religion and past history; racism, xenophobia, anti-Semitism, anti-Islam, anti-immigration; promoting the image of a socially, economically and culturally homogenous organic society; intensive use of conspiracy theories to understand the world we live in; faith in the leader's extraordinariness as well as the belief in his/her ordinariness that brings the leader closer to the people; statism; and the sacralisation of the people (Kaya, 2017: 4).

Right-wing populism is promoted as a political ideology by right-wing parties and movements operating in Western countries. Right-wing political parties and movements that promote Islamophobia, xenophobia, and ethnic nationalism have been gaining ground in Western countries in recent times. This, in turn, is reflected in their active role in the socio-political life of Western countries. Among such right-wing political parties and movements we can list the following ones: the National Front political party in France (led by Marine Le Pen since 2011); the Freedom political party in the Netherlands (founded in 2006, led by Geert Wilders); the Alternative for Germany political party (founded in 2013) and the National Democratic Party (founded in 1964) in Germany; in Italy, the political party Lega Nord (founded in 1989. Its leader is Matteo Salvini), the political party "5 Star Movement" (founded in 2009) and the political party "Brothers of Italy (Italian: Fratelli d'Italia, FdI)" (founded in 2012. The party's leader Giorgia Meloni has been the Prime Minister of Italy since 2022); in Hungary, the political party Jobbik ("For a Better Hungary") (founded in 2003); in Slovakia, the political party "Smer" (Social Democratic) (founded in 1999 by the current Prime Minister of Slovakia, Robert Fico), in Sweden, the political party "Sweden Democrats" (founded in 1988); in Finland, the political party "True Finns" (founded in 1995); in Denmark, the "Danish People's Party" (founded in 1995).

These parties and movements advocate right-wing populism and have combined many of its characteristics. Thus, the mentioned parties promote nationalism, Euroscepticism, and oppose the settlement of immigrants, especially Muslims, in Europe. For example, the government led by Robert Fico, in addition to boycotting the European Union's policy of resettling refugees and immigrants in Europe, adopted a law in the Slovak Republic in December 2016 banning Islam (10-th OIC Observatory Report on İslamophobia, 2017: 45–46.)

The aim of the article is to examine the role of right-wing populism in the spread of Islamophobia in contemporary Western countries.

Islamophobia as one of the main features of right-wing populism

Populist political parties and movements operating in Western countries also actively promote Islamophobia. For example, the political program of the Alternative for Germany (AfG) political party, called the "Manifesto for Germany," adopted in May 2016, clearly reflects the anti-Islamic and Islamophobic nature of this party in its various articles. Thus, the program in question states that Islam does not belong to Germany, that Islam is alien to Germany, that minaret and muezzin calls contradict a tolerant coexistence of religions, which the Christian churches of modernity do practice, and that Muslims in Western society are advised to accept criticism of Islam and its saints (Manifesto for Germany, 2017: 48–49). In addition, the program demands that Islamic organizations not be granted the status of public body (Manifesto for Germany, 2017: 49) and that schools where the Quran is taught be closed (Manifesto for Germany, 2017: 54).

The program, along with promoting Islamophobia, rejects the ideology of multiculturalism as a dangerous ideology. Based on ideas of ethnic nationalism, the program criticizes the ideology of multiculturalism for not giving due value to the culture of the German people, not protecting it, and equating it with foreign cultures. According to the program, the main task facing the government and civil society is to confidently preserve German cultural identity as a leading culture (Manifesto for Germany, 2017: 46). The program pays special attention to the preservation and development of the German language. It is noted that the large number of Muslim immigrants coming to Germany from Muslim countries due to the migrant crisis is a great threat to the development of the country. In the section of the program entitled "Islam and its tense relationship with our value system", it is stated that although the party respects religious freedom, it is categorically opposed to Islamic practice. Such a biased attitude towards Islam is justified by the fact that Islam is supposedly directed against the liberal-democratic constitutional structure and laws of Germany as well as against Judeo-Christian and humanistic foundations of German culture (Manifesto for Germany, 2017: 47). It is claimed that Islam does not belong to Germany, and the increase in Muslims in the country is portrayed as a threat to the state, society, and the values of the German people. While it is noted that Muslims living in the country have equal rights, the parallel Muslim society created by them is criticized (Manifesto for Germany, 2017: 48). The program shows a loyal attitude towards the issue of the publication of caricatures of the Prophet Muhammad in several Western countries, which have offended the religious feelings of Muslims. The issue mentioned in the program is presented not as a manifestation of Islamophobia, but as a matter of freedom of thought and freedom of art (Manifesto for Germany, 2017: 48).

Muslim religious organizations operating in Germany want to obtain the status of public body, official state status under public law. In the AfG party program, this request of Muslim organizations is not accepted because they allegedly do not comply with the requirements of the existing state-religion relations in Germany (freedom of religious belief, separation of religion from the state) (Manifesto for Germany, 2017: 49).

The AfG party's program also includes Islamophobic proposals in the field of education. Such proposals include the abolition of Islamic studies and theology departments in German universities, the teaching of Islam-related subjects in secondary schools only in German, the fact that teachers teach-

ing these subjects must be graduates of German universities and not be under the influence of any Muslim organization, etc. (Manifesto for Germany, 2017: 51–54).

The Islamophobic stance of the AfG party is also reflected in the speeches of its leaders. Alexander Gauland, one of the founders of the party, describes the immigration of Muslims to Germany as an invasion by foreigners. He considers the immigration of Muslims to be a serious threat to German culture and identity. In this regard, he said in one of his speeches: "We say we don't want to lose Germany to an invasion of foreigners from a different culture. Very simple" (John, 2017). Gauland's Islamophobic stance is also reflected in his attitude towards Islam. He states that Islam is not a suitable religion for Germany. He attributes this to the fact that Islam, unlike Catholicism or Protestantism, is aimed at overthrowing the state.the status of public body (Soeren, 2016).

The role of right-wing populist political parties and movements in the socio-political life of Western countries

In modern times, the role of right-wing populist political parties and movements in the socio-political life of Western countries is increasing. These parties and movements, pursuing pragmatic policies, base their activities on issues that reflect the interests of ordinary people and are relevant to society. They skillfully use the people's dissatisfaction with the policies of the ruling circles, primarily immigration policy, for their own political goals. For example, currently in Western countries, right-wing political parties and movements receive support from the people in their struggle for power by showing that the local people's dissatisfaction with immigration is justified. The well-known researcher of populism, Dutch political scientist Kas Mudde, in his article "The Populist Zeitgeist", notes the following features of political parties promoting populism. He believes that right-wing political parties are based on logic and common sense in their activities. They attach great importance to direct democracy, such as referendums, in the governance of the state. They criticize the corrupt political elite, which is not interested in the problems of the people, pursues its own interests. These parties try to attract groups of the population that are critical of politics or are far from politics to their side. They often try to polarize and individualize politics by using friend or foe arguments and significantly simplifying political issues (Mudde, 2004: 541–563).

There are two main reasons for the increasing role of political parties and movements promoting right-wing populism in the socio-political life of Western countries:

1. The migrant (refugee) crisis;

2. The Great Recession.

In modern times, immigration and the migrant crisis it has created have a great impact on the spread of Islamophobia in Western countries. The spread of Islamophobia in society, in turn, creates favorable conditions for the activities of right-wing populist parties and movements. The refugee crisis that has engulfed Europe as a result of the influx of refugees from North Africa and the Middle East into Europe is in the focus of attention of right-wing populist parties. The fact that this crisis has created serious problems for the socio-economic situation and security of the local population in European countries has led a large part of the population to turn to right-wing populist parties and support them during elections. As a result, the influence of right-wing populist parties in Europe is increasing. In other words, the anti-immigration policy of right-wing populist parties creates a favorable opportunity for them to attract voters to their ranks.

The anti-Muslim and Islamophobic ideas underlying the anti-immigration policies of right-wing populist parties and movements, on the one hand, increase voters' support for these parties, and on the other hand, lead to an increase in Islamophobic tendencies in society. After becoming members of these parties, voters' anti-Muslim and Islamophobic positions are further strengthened.

Another reason for the rise of right-wing populism in Western countries was related to the Great Recession that occurred in 2007–2009. Although the Great Recession lasted from December 2007 to June 2009, its negative effects were evident in the socio-economic development of some Western

countries even until 2016. These countries achieved their pre-Great Recession levels in a number of economic indicators only in 2016.

For example, as a result of the Great Recession, the volume of gross domestic product (GDP) in the United States decreased by $650 billion (approximately 4.3%) (U.S. Bureau of Economic Analysis, 2019), the number of people with jobs (excluding agriculture) decreased by 8.6 million people (6.2%) (U.S. Bureau of Economic Analysis, 2018). In October 2009, the unemployment rate in the country reached 10% (U.S. Bureau of Labor Statistics, 2019). The US managed to restore the pre-Great Recession levels for the aforementioned indicators – GDP in the third quarter of 2011, employment in May 2014, and unemployment in June 2016 (U.S. Bureau of Labor Statistics, 2019).

The Great Recession, which was an economic and financial crisis by its nature, also had negative consequences in the political sphere. It posed a threat to political stability in the countries where it spread. Thus, the Great Recession, which was accompanied by a serious economic and financial recession in the countries and a sharp deterioration in the material well-being of the population, led to mass protests against the government. This, in turn, further accelerated the spread of right-wing populism.

Thus, in modern Western countries, the migrant crisis and economic recession lead to an increase in the role of right-wing populist parties and movements in the socio-political life of these countries. This, in turn, is observed in the increase in cases of intolerance and violence against Muslims. An example of this is the PEGIDA movement ("Patriotische Europäer gegen die Islamisierung des Abendlandes" – "Patriotic Europeans against the Islamization of the West") operating in Germany. This movement is notable for its activity not only in Germany, but also throughout Europe. The PEGIDA movement, which emerged in 2014, is a far-right and anti-Islam movement. PEGIDA, which considers Islam and Muslim immigrants to be a major threat to Germany, is fighting against the country's current immigration policy. It portrays Muslim immigrants as criminals, homophobes, and terrorists and opposes their settlement in Germany. In addition, PEGIDA supporters claim that Muslim immigrants pose a threat to the German economy and welfare state, and that the social assistance provided to them by the government hinders the country's socio-economic development.

Right-wing populist political forces use stereotypes and conspiracy theories related to Islam and Muslims in their activities, trying to instill them in the public consciousness of the local population. The most widespread of these stereotypes are the following:

1. Muslims are prone to terrorism

After the well-known terrorist incidents in the United States on September 11, 2001, right-wing forces in Western countries have frequently used the term "Islamic terrorism" in the political lexicon, portraying Muslims as terrorists;

2. Muslims are anti-Semitic

Muslims have historically been said to have harbored hatred for Jews. As a continuation of this, Muslim anti-Semitism is now presented as a major component of modern anti-Semitism;

3. Muslims advocate gender inequality

The supposedly patriarchal religion of Islam does not accept equality between men and women. Therefore, women's rights are violated by men, women are subjected to domestic violence, and they are forced into marriage. All this does not correspond to German norms on gender issues;

4. Muslims demonstrate intolerance towards sexual minorities

To further tarnish the image of Islam and its followers in public opinion, Islamophobes portray Islam as a religion that does not treat sexual minorities as equal citizens of society, persecutes them, and subjects them to violence;

5. Muslims are not inclined to integrate into Western society, including German society

Muslims are not integrated into Western society, including German society because their ethno-cultural values do not correspond to those of the West. Sometimes they deliberately resist their integration.

In their propaganda, right-wing forces justify their activities among the population by citing the aforementioned stereotypes about Islam and Muslims, thereby attempting to win the population over to their side. Unfortunately, they have largely succeeded in achieving their goals. Clear evidence of this is the rapid spread of Islamophobia among the local population. “Islamophobia in Germany. National Report 2022” prepared by Zubair Ahmad presents the results of several studies proving the prevalence of Islamophobia among the local population in Germany (Ahmad, 2023: 271). According to these results, in 2020, almost half of the country's population (46.8%) agreed with the statement ""due to the many Muslims here, I sometimes feel like a stranger in my own country.” 24.7 percent of respondents believe that Muslim immigration to Germany should be banned. Only a third of respondents consider Islam to be beneficial to society. Half of respondents (52%) view Islam as a threat. As a result, many people today perceive Islam not as a religion, but as an anti-democratic and extremist ideology. The reasons for this are primarily related to the media, which portray Islam and Muslims almost exclusively in a negative context (Ahmad, 2023: 271).

Among the above-mentioned signs of right-wing populism, such as anti-elitism, anti-intellectualism, racism, ethnic nationalism, xenophobia, anti-Semitism, Islamophobia, anti-immigration, and promotion of a socially, economically, and culturally homogeneous organic society, Islamophobia is considered one of its main signs in Western countries for the modern era. Currently, the positions of right-wing populism are strengthening in the socio-political life of Western countries. That is why right-wing populism plays an important role in the spread of Islamophobia in Western countries in the modern era. Islamophobia is one of the main directions of the activities of right-wing populist parties and movements in Western countries. Right-wing parties and movements note that the increase in the number of Muslims in Western countries leads to a decrease in the standard of living of the people and poses a threat to their ethnic and cultural values. In short, they note that the increase in the number of Muslims in Western countries is contrary to the national interests of the country. Since the increase in the number of Muslims in Western countries is mainly due to immigration, anti-immigration policy is also one of the main directions of the activities of right-wing populist parties and movements. In Western countries, right-wing populist parties and movements are influencing the growth of anti-Muslim and Islamophobic sentiment among the country's population by linking the socio-economic crisis with immigration and the increase in the number of Muslims in the country.

Conclusion. Thus, right-wing populism acts as one of the main reasons for the emergence and spread of Islamophobia in Western countries in modern times. Its function in relation to Islamophobia is realized through right-wing political parties and movements operating in these countries and promoting the ideology of right-wing populism. The migrant crisis faced by Western countries in modern times worsens the socio-economic situation in society and lowers the standard of living of the population. This, in turn, creates conditions for right-wing political parties and movements to be supported by the broad masses of the people. As a result, the social bases of right-wing forces are strengthened. Right-wing forces do not limit their anti-Islam activities to propaganda. They also resort to violence and terrorism in their fight against Muslims. This further increases the scale and impact of their Islamophobic activities. A large number of innocent people are killed in terrorist incidents committed against Muslims by right-wing forces. One of the most horrific acts of terror committed against Muslims by right-wing forces in Western countries in recent times is the incident committed by an Islamophobe named Brenton Tarrant on March 15, 2019, at two mosques in Christchurch, New Zealand, which resulted in the deaths of 51 innocent Muslims and the injury of 49 others (Sengupta, 2019).

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ELIZABETH II AND THE NEW GLOBAL POLITICAL ARCHITECTURE: BETWEEN TRADITION AND NETWORKS OF INFLUENCE

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Abstract. The article is devoted to the analysis of Queen Elizabeth II's role as a specific global political actor in the 20th–21st centuries. The study aims to examine the transformation of the British monarchy from a classical imperial model to a networked architecture of influence centered around the Commonwealth of Nations. It is shown that, under conditions of constitutional neutrality, the Queen exercised significant symbolic and informal influence on international processes, combining Christian tradition, historical continuity, and modern diplomatic mechanisms. Special attention is given to the Christian symbolism of the monarchy, particularly in the context of Elizabeth II's death and funeral ceremony, which emphasized the immortality of the monarchy as an institution and the limits of human power. The article also analyzes the significance of Commonwealth policy in fostering international solidarity, particularly regarding Ukraine. The study concludes that the figure of the Queen embodies a new type of global politics in which connections, legitimacy, and symbolic authority play a central role, rather than territorial control.

Key words: Elizabeth II, British monarchy, Commonwealth of Nations, symbolic power, global politics, post-imperial transformation, Christian tradition, political symbolism, international solidarity, networks of influence, geopolitics, constitutional monarchy, Ukraine, historical continuity, legitimacy.

Statement of the Research Problem. The death of Queen Elizabeth II became an event that was not only symbolic but also deeply political in the broadest sense of the word. It marked the end of the longest reign in the history of the British monarchy and, at the same time, drew a line under an entire era of world politics that developed in the twentieth century and transformed at the beginning of the twenty-first century. Yet, behind the scale of the Queen's personal notoriety and public presence lies a paradox: her actual political influence, mechanisms of action, and role in shaping the global political architecture remain insufficiently analyzed in a strictly scholarly context. Mintah (2024)

Despite a substantial body of journalistic, memoir, and popular literature, Queen Elizabeth II's figure rarely becomes the subject of systematic political science analysis. This is particularly true for studies that go beyond a formal description of the constitutional role of the monarch and address informal, symbolic, and network mechanisms of influence. In this perspective, the monarchy appears not as an anachronism but as a specific form of political stabilization and long-term governance of relationships.

In Ukrainian political science, this issue remains even less developed. Scholars' attention focuses mainly on republican institutional models, security, war, and post-Soviet transformations. At the same time, the phenomenon of the British monarchy, particularly during the reign of Queen Elizabeth II, is rarely analyzed as an independent factor in global politics and international solidarity, including its relevance to Ukraine.

This gap determines the relevance of the present study. The Queen's figure allows for a renewed understanding of the interaction between symbolic power, Christian tradition, and contemporary geopolitics in a world where formal borders are increasingly giving way to networks of connections and trust.

Review of Key Publications. In the contemporary world, the British monarchy continues to function less as a political institution and more as a symbolic one, capable of shaping both domestic and

international perceptions of the state. Research by Cook and Searle (2020, 2022) demonstrates that Elizabeth II employed mechanisms of soft power, combining traditional ceremonial practices with the personalization of the monarchy, which helped to foster a positive image of Britain globally and maintain internal stability. Similarly, Twomey (2020) emphasizes that female monarchs, particularly Elizabeth II, could influence international politics and public opinion without exceeding the boundaries of formal political authority.

Comparative contemporary studies by Ginsburg (2020) and Taylor (2024) confirm that the monarchy remains a stabilizing element in European democracies, providing the state with symbolic legitimacy even amid media and social transformations. Taylor notes that under the reign of Charles III, the monarchy retains its adaptability, combining traditional elements with new media narratives, thus ensuring the institution's "intelligible" legitimacy.

At the same time, public perception of the monarchy is heterogeneous and depends on age, cultural context, and media factors. Greenstein et al. (1974) demonstrate how perceptions of monarchs are formed in childhood, influencing later views on authority and state institutions. Contemporary studies by Gellwitzki et al. (2024) and Mintah (2024) show that the death and end of Elizabeth II's reign elicited varied reactions among societies and media, reflecting conflicting narratives and ambiguous global perceptions of Britain, particularly within Commonwealth countries.

Elizabeth II's legacy encompasses both a direct influence on the political and cultural stability of the Commonwealth and a broader symbolic effect worldwide. Rotaru (2023) highlights that her role within the Commonwealth involved maintaining unity and stability, while Markovich (2022) emphasizes the symbolic aspect of the British monarchy, which allows balancing tradition with modern societal expectations.

Thus, Elizabeth II left a unique legacy combining stabilizing symbolic functions, diplomatic soft power, and the capacity to shape public opinion in a global context. Her reign demonstrates that a monarchy can remain relevant and influential without being politically active, while providing the cultural and symbolic foundation for the continued development of British statehood and the international image of the United Kingdom.

The aim of this article is to provide a comprehensive political science analysis of Queen Elizabeth II's role as a global political actor amid the transformation of classical empires and the formation of a new world political architecture. Special attention is given to the symbolic, informal, and network mechanisms of influence of the British monarchy, as well as their significance for Ukraine and the international system as a whole.

Main Content. Elizabeth II's coronation took place in 1953, a landmark moment not only for the United Kingdom but also for the entire Commonwealth of Nations. Her reign lasted 69 years, a period of exceptional stability and continuity in a rapidly changing world. Only Louis XIV of France exceeded this record, ruling for 72 years. Officially, Elizabeth II held the title of Queen of the United Kingdom of Great Britain and Northern Ireland. However, her influence extended far beyond a single country. She was also queen of fourteen Commonwealth countries, a status that emphasized not only formal authority but also her symbolic role in maintaining the unity of numerous independent states historically emerging from the former British Empire.

The length of her reign allowed her to witness numerous global transformations: the dissolution of empires, the rise of new states, the emergence of modern international politics, and the global economy. Elizabeth II remained a constant symbol of stability, moral authority, and consistency. Her role was not merely ceremonial but essential for understanding the evolution of modern monarchies.

It should be noted that her biography is intertwined with twentieth- and early twenty-first-century world history. The nineteenth century was the era of global empires. The British, French, German, Austro-Hungarian, Portuguese, and Russian empires shaped the world order and divided continents among themselves. These countries were small in territorial size but controlled vast overseas colonies, determining the fate of millions of people.

At the beginning of the twentieth century, most empires began to collapse. This was a natural historical process that could not be stopped. Yet, despite these challenges, the British Empire proved to be exceptionally flexible. It survived the period of decline and transformed into a new political architecture that held strategic significance for the world. Instead of completely severing ties, the Dominions maintained connections with the United Kingdom. This process culminated during the reign of Queen Elizabeth II, who emerged as a symbol of unity and stability (Gellwitzki et al., 2024).

Thanks to her, the British Empire acquired a new dimension–the Commonwealth of Nations, uniting 54 countries. Queen Elizabeth II not only formally presided over these states but also subtly facilitated their interaction, demonstrating an ability to combine tradition and modernity. Her role was not overtly political, yet it was highly influential. Through her wisdom and perceptiveness, these countries were able to remain within a cohesive system, preserving cultural, economic, and political ties (Rotaru, 2023).

Queen Elizabeth II transformed the empire's transition into a masterful act of diplomacy and symbolic authority. She embodied the principle that true leadership does not always mean direct control, but always entails the ability to unite, shape, and sustain mutual understanding. Her reign provided living proof that a monarch could be the soul of a state even when their powers were formal.

Elizabeth II occupied a unique position. As a monarch, she formally refrained from daily political intervention, yet her symbolic power was extraordinarily potent. She demonstrated that influence could be exercised even without direct authority. The Queen's diplomatic skill was evident in her ability to maintain the stability and unity of the Commonwealth of Nations (Markovich, 2022).

Collaboration with British politicians and diplomats served as an invisible but highly effective instrument. Elizabeth II possessed a keen sense of timing, knowing when to make a symbolic gesture and when to leave space for political processes. Her tours of the Dominions and meetings with state leaders fostered trust, strengthened the moral authority of the United Kingdom, and promoted the development of partnership relations.

The political architecture of the Commonwealth was among her greatest achievements. She supported the independence of the Dominions while maintaining a unified political and symbolic space. Through ceremonial functions, speeches, and diplomatic gestures, the Queen influenced international politics without exercising direct administrative power. Her role consisted of moderating relationships, sustaining connections, and ensuring the harmonious coexistence of states within the Commonwealth.

Particularly important is Elizabeth II's stance toward Ukraine. Although her formal powers were limited by protocol, she indirectly contributed to strengthening international relations that supported Ukraine. Her symbolic presence, diplomatic gestures, and coordination through the Commonwealth demonstrate how a single monarch, situated on a small island, could exert influence on global processes.

Thus, Elizabeth II left a legacy that fused tradition and modernity. Her authority was invisible yet effective. She showed the world that the power of symbol, moral authority, and wise presence can shape political and cultural architecture on a global scale, even from a small territory (Twomey, 2020).

To better understand her role in world politics, it is necessary to examine the major milestones in the history of the British monarchy in the twentieth century.

The 1920s and 1930s represented a period of strategic transformation for the British Empire. Politicians at the time were the first to fully realize the crisis of the classical imperial model. Long-standing practices of purely military control proved insufficient for sustaining global power. Recognizing the inevitability of the collapse of classical empires became a key factor in developing new strategies. Already then, approaches emerged that later enabled Queen Elizabeth II to effectively exercise symbolic and diplomatic leadership, combining tradition with modern challenges (Greenstein et al., 1974).

In response to the crisis, Britain adopted a flexible policy toward its colonies and Dominions. This policy combined different instruments: military intervention where necessary, gradual withdrawal from certain territories, and support for the independence of new states. Recognition of independence became a managed process rather than a defeat, demonstrating London's political prudence. Symbolically, it was Queen Elizabeth II who later became the guarantor of the stability of these relations. Her presence during ceremonies, meetings, and diplomatic visits across the Dominions showed that a single monarch could unite nations without exercising direct administrative power.

The final transition from empire to the Commonwealth of Nations occurred under Elizabeth II. She became a symbol of unity and moral authority, maintaining interaction among 54 independent states within a single political space. This transformation established a new global political architecture, where mutual respect and cooperation became guiding principles rather than control and coercion. The Queen demonstrated that effective leadership lies not in direct authority but in the ability to unite, model, and sustain stability on a global scale.

The shift from military imperial methods to diplomatic and ceremonial instruments created the conditions for the modern structure of the Commonwealth. Thanks to the wisdom and perseverance of Queen Elizabeth II, this transformation became organic, harmonious, and lasting (Rotaru, 2023).

Within the Commonwealth, the monarch served as a symbol rather than a direct administrator. Elizabeth II never interfered in the domestic affairs of member states, yet her symbolic presence was critically important. She embodied the idea of fraternity and historical continuity, connecting the present with centuries-old traditions. Through her personality, the Queen demonstrated that influence could be exercised not through orders but through moral authority and cultural ties.

One of the Queen's most important functions was her informal participation in resolving economic crises and political conflicts. She acted as a "neutral moderator," remaining outside direct political influence while simultaneously ensuring stability and coordination among states. This capacity for subtle influence demonstrates her profound understanding of diplomacy.

The transition from the imperial hierarchy to the Commonwealth of Nations showed that Queen Elizabeth II created a unique mechanism for global stability. Her influence was simultaneously invisible and powerful, demonstrating that symbolic authority can have tremendous practical significance.

Before examining the specific mechanisms of Britain's global influence, it is important to understand its strategic concept. Here, the key factor is not territory, but a network of connections that sustain stability and political order in the world. This approach distinguishes the British model from classical empires.

British policy deliberately moves away from the traditional understanding of borders as the main source of influence. It demonstrates that control over land alone does not guarantee global stability. This sharply contrasts with Russian imperial logic, where territorial acquisition has always been regarded as the primary instrument of power. Queen Elizabeth II exemplified that true influence is formed not through coercion, but through symbolic and diplomatic ties.

For Britain, the development of political, economic, and cultural-historical links is decisive. Political contacts ensure stability and consensus among Commonwealth states. Economic integration, trade agreements, and joint projects strengthen interdependence. Cultural and historical connections–including ceremonies, symbols, and shared history–create an invisible yet strong fabric of cooperation. Queen Elizabeth II always served as a living symbol of this unity, emphasizing the importance of tradition and moral authority (Ginsburg, 2020).

Granting independence to Dominions and former colonies did not signify a loss of influence. Britain demonstrated that it is possible to release a state into formal independence while maintaining its loyalty and partnership without coercion. This makes the political system flexible and resilient. Elizabeth II showed that a monarch's authority can shape global processes even from a limited territory, and that symbolic leadership can be more effective than direct administrative rule.

Before considering the specific mechanisms through which the Commonwealth influences global politics, one must appreciate its scale. It is not merely a network of states with shared traditions, but a powerful geopolitical actor. Through this system, Britain and Queen Elizabeth II were able to exert indirect influence on world events, leveraging the symbolic and practical weight of the Commonwealth.

The Commonwealth covers an area of approximately 31.5 million km², which represents a significant geographical resource. Its population numbers several billion, giving it a global impact on economic and political processes. This network of states demonstrates that the authority of the monarch and symbolic ties (Cook & Searle, 2020) can significantly amplify traditional instruments of international influence.

One of Britain's most effective instruments of influence is its sanctions policy. When the United Kingdom imposes restrictions, it signals all Commonwealth members. Many countries automatically join these sanctions, creating a disproportionate effect on the targeted economies, including Russia. This mechanism illustrates how the symbolic role of Queen Elizabeth II and the institutional structure of the Commonwealth enable the shaping of global events without direct control.

After considering the geopolitical scale of the Commonwealth and Britain's influence concept, it is natural to turn to the specific role of Queen Elizabeth II in the contemporary world. Her position demonstrates how symbolic power and a prolonged presence on the throne can shape global processes even in the twenty-first century. The Queen emerges not only as a head of state, but also as a coordinator of a network uniting dozens of independent countries.

Queen Elizabeth II developed a new type of politics, in which territorial borders cease to be the main factor of influence. The primary focus became maintaining connections between the independent states of the Commonwealth, ensuring stability and predictability in international relations. At the same time, the Queen's influence remained predominantly informal yet highly effective. Through diplomatic, symbolic, and ceremonial mechanisms, she could indirectly shape the domestic and foreign policies of countries, emphasizing that the authority of a monarch can substitute for direct power on a global scale (Cook & Searle, 2022).

After analyzing the Commonwealth's global role and the symbolic influence of the Queen, it is natural to examine her specific impact on Ukraine. Despite constitutional neutrality, Queen Elizabeth II was able, through symbolism and indirect action, to create conditions for significant political processes. Her strategic position demonstrates that even limited formal authority can have a global effect.

Queen Elizabeth II was not permitted to openly support political parties or express specific political positions. Nevertheless, her indirect signals and ritual gestures carried deep symbolic meaning. Through participation in ceremonies, visits to the Dominions, and diplomatic contacts, she communicated her stance on important events while simultaneously upholding the authority of the Commonwealth and the unity of its member states.

A key moment was the referendum of December 1, 1991, which confirmed Ukraine's independence. Poland was the first country to officially recognize it; however, the role of Commonwealth countries, particularly Canada, proved critical. Under the leadership of Queen Elizabeth II, Britain formally recognized Ukraine on December 2, 1992, with the United States joining later. This process underscores that the Queen's influence was not direct, but structural and symbolic, shaping international consensus.

In the following decades, Canada remained an active ally of Ukraine. By the time of Russia's large-scale aggression in February 2022, Commonwealth countries oriented toward Britain and guided by the Queen's symbolic signals were already prepared to provide rapid military, instructional, and economic support. Thus, the continuity of Commonwealth policy and the invisible but powerful influence of Elizabeth II helped create the conditions for a swift and coordinated response to global crises.

Through her symbolic actions and diplomatic levers, Queen Elizabeth II emerged as a "symbol of a new type of global politics." She demonstrated that even in the twenty-first century, a monarch,

while formally neutral, could indirectly influence the destinies of states and shape international coalitions, ensuring the effectiveness of Commonwealth mechanisms.

It is important to recognize that the late period of Elizabeth II's reign was characterized not only by formal authority but also by a powerful symbolic influence. The Queen was able to transform traditional rituals and monarchical practices into a modern instrument of global politics. Her activity demonstrates that symbolic power can be even more significant than direct administrative authority.

After decolonization, only the United Kingdom and Northern Ireland remained, along with a few small overseas territories, mostly uninhabited islands. In this context, Queen Elizabeth II became a symbolic "fabric" that maintained the unity of former colonies, notably Canada and Australia. Through her authority and example, a new model of global politics was formed. Her influence combined symbolic power with the network of the Commonwealth, completing the formation of a new political architecture in the twentieth and twenty-first centuries.

The Queen conducted regular visits to the Dominions, demonstrating a civilized process of decolonization. During these trips, her activity combined official protocol with direct contact with citizens. The Royal Household adapted to societal changes, maintaining authority through openness and attention to people's needs. This approach allowed Elizabeth II to maintain leadership and inspire respect for traditions without coercion.

The Queen skillfully combined traditional rituals with contemporary cultural manifestations. The awarding of British Empire honors to figures such as The Beatles or J.K. Rowling became a symbol of support for modern culture while preserving historical context. Participation in cultural and sporting events, including the 2012 Olympic campaign, emphasized her openness and adaptability. This combination of tradition and modernity ensured the monarchy's sustained influence and highlighted Elizabeth II's uniqueness as a leader of a new type.

Gradually, the twenty-first century demonstrated that even the most resilient institutions face pressures of modernity. The British Royal Family was no exception. Despite personal crises and public scandals, Queen Elizabeth II remained a symbol of stability and moral authority. Her ability to maintain distance while simultaneously upholding the family's prestige minimized the consequences of public scrutiny.

The marriage of Prince Charles and Camilla in 2005, and the associated formal procedures, illustrated that the Queen participated only at the level of protocol, remaining above family intrigues. Scandals involving Prince Harry and Meghan Markle further demonstrated the complexity of managing the monarchy's reputation in an open media environment. Public coverage of these events highlighted that even in challenging situations, the Queen's symbolic distance allowed the institution to retain its authority (Taylor, 2024).

These familial crises did not weaken the monarchy; on the contrary, the combination of modernity and tradition created in the public a sense of a living institution. The Queen's presence in public life, even at an advanced age, demonstrated the continuity and inviolability of monarchical values. This strategy strengthened the legitimacy of the monarchy and maintained deep public loyalty.

The gradual process of aging and health issues inevitably affected Elizabeth II's activity. The death of Prince Philip and the COVID-19 pandemic led the Queen to miss important events, including the State Opening of Parliament. At the same time, some of her duties were delegated to her son, Prince Charles, demonstrating a thoughtful approach to ensuring succession.

The development of a detailed plan since the 1960s attests to the monarchy's high level of organization. Coordination among the government, police, church, and family members ensured flawless implementation in the event of the Queen's passing. The code phrase "London Bridge is down" served as the signal to initiate this plan, demonstrating a strict yet elegant protocol in which the Queen played a direct role in determining the sequence of actions.

The British monarchy, despite criticism over state funding, provides significant economic returns to the country. Its operation not only preserves historical traditions but also generates a powerful cultural and financial resource, particularly evident during public events and tourism.

The Royal Family, funded by the state budget, brings tangible revenue. In 2021, direct income to the state amounted to approximately half a billion USD. Indirect revenues through tourism–such as visits to Buckingham Palace, souvenir purchases, and participation in various ceremonies–further enhance this economic contribution. This demonstrates that the monarchy serves not only as a symbolic but also as an effective state resource (Cook & Searle, 2020).

In parallel with its financial aspect, the monarch plays a stabilizing and neutral role in the complex political system of the United Kingdom. The formal ruler stands "above party intrigues," does not intervene in internal party conflicts, yet sets the tone of stability and moral authority. This combination of symbolic leadership and neutrality supports political equilibrium, which is particularly important for a country with a multidimensional governance system.

Throughout her long reign, Elizabeth II became not merely a political leader but a true symbol of England for contemporaries and future generations. Her image embodies continuity of tradition, stability, and national unity, particularly in times of crisis. During wars, economic shocks, and frequent changes of prime ministers, the Queen acted as a continuous "anchor" of national interests, capable of maintaining the country's moral and political resilience.

Elizabeth II became the center of the British collective imagination. Her image and activity united the nation, creating a sense of stability and continuity of state institutions. She demonstrated that a monarch can be more than a formal head of state; the Queen represented a symbol of brotherhood, moral resilience, and cultural heritage. This symbolic status allowed the country to navigate social and political changes without losing internal cohesion (Ginsburg, 2020).

Despite the significant workload and her advanced age, Elizabeth II carried out formal state functions even under difficult circumstances. She demonstrated impeccable discipline and dedication to duty, maintaining the authority of the monarchy. Her public persona–smiling, polite, attentive to prime ministers and citizens–emphasized her ability to combine humanity with the high status of a state leader. This combination of discipline, devotion, and symbolic presence shaped the perception of the monarchy as a stable, continuous, and morally strong institution.

The death of Elizabeth II became a landmark event not only for the United Kingdom but for the entire world. After seventy years of flawless reign–the longest among British monarchs–the Queen passed away on 8 September at her Balmoral Castle in Scotland. This event marked the end of an era that defined the modern political architecture of the Commonwealth. Eleven days later, on 19 September, her funeral was held at Westminster Abbey, a symbolic act uniting history, religion, and state tradition (Cook & Searle, 2022).

The funeral ceremony was rich in profound symbolism, reflecting the core principles of the Christian faith–death and resurrection. On the Queen's coffin were placed the crown, scepter, and orb–classical symbols of monarchical authority that signify the divine origin of power. At the same time, after the burial, these symbols were "returned to God," demonstrating that Elizabeth II, as an individual, had passed to the Lord, while leaving the institution of the monarchy alive and intact. This underscores the principle that the death of a specific monarch does not entail the cessation of the monarchy itself; the institution remains immortal.

The religious context of Elizabeth II's life and reign was deeply manifested throughout her tenure on the throne. Her annual Christmas messages, participation in ceremonies, and symbolic gestures reflected the Queen's faith as an integral component of monarchical service. The funeral ceremony became the culmination of this spiritual dimension: it simultaneously testified to Elizabeth II's deep Christian faith and confirmed the significance of the monarch's symbolic authority for society.

Thus, the funeral of Elizabeth II combined tradition and spirituality with political symbolism, demonstrating the Queen's unique role as a person who embodied Christian faith in state service,

while leaving the institution of the monarchy alive and immortal. This aspect of her reign confirms that the British monarchy is not merely a formal institution but also a bearer of the state's spiritual and moral continuity, fostering in society a sense of eternity and stability (Mintah, 2024).

The monarchical nature of the British crown was formed not only as a political institution but also as a deeply symbolic system rooted in the Christian worldview of Europe. It derives from the notion of the sacredness of authority, which is not self-sufficient but received "from above" and therefore always constrained by a higher moral order. In this sense, the British monarchy preserves the continuity of the medieval Christian understanding of authority as service rather than possession.

The idea of Christ's eternal reign–a central tenet of Christian theology–is reflected in monarchical symbolism. Coronation, oaths, and the use of sacred objects are not merely archaic rituals; they serve as a reminder of the transcendent dimension of authority. The monarch, and specifically the Queen, is not an absolute ruler but a temporary bearer of service within earthly history, subordinate to a higher, divine order.

In this context, the monarchy performs an essential existential function. It reminds society of the limitations of human life, the transience of political structures, and, at the same time, the existence of spiritual values that are not subject to electoral cycles or ideological fashions. The death of a monarch does not destroy the system–it merely emphasizes its metaphysical dimension.

From the perspective of state theory, the monarchy is one of the few institutions capable of demonstrating temporal continuity. It remains stable even after the death of a specific officeholder because its significance lies not in the individual but in the institution. Therefore, the succession of a monarch occurs without political vacuum, without a legitimacy crisis, and without the need to reestablish the state.

In the symbolic and spiritual dimension, the king or queen functions as a "representative of God on earth." This concept should not be understood literally or theocratically; rather, it signifies the representation of a moral order that stands above politics, party struggles, and temporary interests. In this sense, the Queen was not the source of power but its ethical limitation.

The stabilizing function performed by the monarchy lies precisely in symbolizing the continuity of the state. It embodies the connection between generations, between past and future, and between tradition and modernity. Governments, political courses, and even social structures change, but the monarchy remains a point of reference–a kind of "anchor" of historical memory.

In the modern world, attitudes toward monarchy differ significantly depending on civilizational tradition. American republicanism, shaped in the context of the anti-monarchical revolution of the eighteenth century, fundamentally rejects monarchy as a form of government, viewing it as an anachronism or a threat to equality. This is a logically consistent position within the framework of the American political myth, but it is not universal (Ginsburg, 2020).

European monarchies, by contrast, have preserved their Christian foundations and ceremonial significance, combining spiritual symbolism with political prestige. They do not compete with democracy but coexist with it, performing a different function–a metapolitical one. It is in this combination of sacred, historical, and contemporary dimensions that their viability is found.

Queen Elizabeth II became perhaps the purest embodiment of this model. She demonstrated that monarchy can be simultaneously traditional and modern, Christian in spirit, and globally influential. Her role thus transcends British history, remaining a critical reference point for understanding twenty-first-century politics.

Conclusion. The study of Elizabeth II and the transformation of the British Empire into the Commonwealth of Nations suggests that in the second half of the twentieth century and the early twenty-first century, the very nature of global political influence underwent a qualitative change. Power increasingly relied less on territorial control and more on networks of connections, symbolic authority, and the ability to cultivate trust among formally independent states.

The British monarchy, embodied in the Queen, did not act as a relic of an imperial past but as an instrument for overcoming it. Under her reign, the transition from a classical empire to a new political architecture was completed, wherein former colonies were not lost but transformed into partners. The Commonwealth of Nations became a unique example of a "post-imperial space," preserving influence without coercion and loyalty without subjugation.

Elizabeth II played a key role in this transformation not through formal political decisions but through symbolic presence, stability, and personal dedication to duty. Her constitutional neutrality did not imply a lack of influence; on the contrary, it allowed her to act as a moderator of complex processes, a guarantor of continuity, and a moral guide for the Commonwealth states.

The Ukrainian context acquires particular significance. The positions of Commonwealth states, notably Canada and Australia, and their rapid responses to events after 2014 and especially after February 24, 2022, demonstrate the long-term continuity of a political line established during the reign of the Queen. In this sense, Elizabeth II emerges as a symbol of a new type of global politics, in which geographic distance does not diminish responsibility, and historical ties are transformed into practical solidarity. The Christian dimension of the monarchy, vividly manifested in the Queen's funeral ceremonies, underscored another fundamental characteristic of this institution–the recognition of the limits of earthly power. The monarchy reminds society that political order is not absolute, that life is fleeting, and that institutions must serve higher values. The death of a specific monarch does not destroy the system; it only confirms its metaphysical continuity.

Thus, Elizabeth II can be considered one of the key figures in twentieth- and twenty-first-century global politics, not in the conventional sense of authority, but in a civilizational sense. She embodied the transition from imperial dominance to symbolic leadership, from power to influence, and from borders to networks. Her reign marked the conclusion of the "long twentieth century" and simultaneously laid one of the foundations for the new global order.

Further study of the British monarchy and the role of Elizabeth II opens a broad interdisciplinary field for scholarly research. First, a detailed analysis of the monarchy as a form of "soft power" appears particularly promising. It functions beyond classical instruments of political governance yet exerts long-term and structural influence on international relations.

The Commonwealth of Nations deserves focused study as a unique model of post-imperial integration. Comparative analysis of its effectiveness with other post-colonial formations will allow a more precise assessment of the role of the Queen's symbolic leadership in maintaining political loyalty, coordinating positions, and establishing shared value frameworks among formally sovereign states.

Another important research direction concerns the Christian dimension of monarchical authority in a secularized world. In particular, it is worth examining how religious symbolism, rituals, and the concept of the "divine origin of authority" preserve their legitimizing function in modern democracies without conflicting with constitutional principles.

The analysis of political continuity between Elizabeth II's reign and the current phase of British foreign policy is also promising. In this context, it is appropriate to trace the extent to which the model of global networks formed under the Queen continues to influence Commonwealth states' decisions regarding security, sanction policies, and the support of international law and order.

The Ukrainian dimension constitutes a separate research block. Future studies could focus on the role of Commonwealth states in forming an international coalition in support of Ukraine, as well as on the long-term symbolic and institutional consequences of policies initiated during the Queen's reign. This will allow for a deeper understanding of the mechanisms for rapid mobilization of solidarity in crisis situations.

Finally, a promising theoretical avenue lies in conceptualizing the monarchy as a form of political memory. In this regard, Elizabeth II emerges not only as a historical figure but also as a bearer of continuity, linking different eras, political regimes, and civilizational shifts. Analysis of this phenomenon may contribute to a broader understanding of the role of tradition in shaping the future global order.

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STATE POLICY PRIORITIES IN THE FIELD OF HUMANITARIAN SECURITY OF INTERNALLY DISPLACED PERSONS UNDER CONDITIONS OF WAR

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Abstract. This article explores the transformation of Ukraine's public governance priorities in ensuring the protection and resilience of persons forcibly displaced within the country as a result of the full-scale armed conflict. The study addresses the urgent need for a comprehensive policy response to large-scale internal displacement, which has become a critical challenge for social stability and national resilience.

The research applies general scientific methods (analysis, synthesis, induction, and deduction) alongside special legal methods, including comparative legal and normative analysis. These methods make it possible to assess the existing regulatory framework and institutional mechanisms governing humanitarian responses to internal displacement.

The findings demonstrate that effective policy responses must move beyond emergency assistance toward integrated and long-term solutions. Priority directions include strengthening legal regulation, ensuring equitable access to education, healthcare, and employment, expanding psychosocial support, enhancing local-level institutional capacity, and fostering cooperation with international and non-governmental actors. The study also identifies persistent challenges, such as limited financial resources, administrative barriers, uneven service provision, and risks of social exclusion.

The article concludes that addressing internal displacement requires a human-centered, cross-sectoral policy model aimed at sustainable integration and long-term societal resilience. The results may be used to improve public strategies and institutional practices in the context of recovery and reconstruction.

Key words: forced displacement; public governance; national resilience; social integration; legal regulation; psychosocial support; institutional capacity.

Introduction. As a result of the full-scale military aggression of the Russian Federation, Ukraine has faced unprecedented challenges that have brought the issue of humanitarian security to the forefront of state policy, particularly in the context of protecting the rights and legitimate interests of internally displaced persons (IDPs). According to official data from the Ministry of Social Policy of Ukraine, the number of registered internally displaced persons has exceeded five million, and this figure continues to change due to ongoing hostilities, the destruction of housing, social and humanitarian infrastructure, as well as educational and healthcare institutions (Ministry of Social Policy of Ukraine, 2023, p. 56). Consequently, the state has encountered an exceptionally complex task – ensuring comprehensive humanitarian security for a significant portion of its population under wartime conditions.

In Ukrainian academic discourse, the concept of humanitarian security is interpreted as an integral component of national security, encompassing the protection of human life and health, rights and freedoms, as well as the preservation of the educational, cultural, and information space of the state (Lukianets, 2021, pp. 47–49; Haiduk, 2020, pp. 11–13). This concept acquires particular significance with regard to internally displaced persons, who, as a result of armed conflict, lose not only their homes and employment but also their habitual social environment, social ties, and opportunities for full personal development. Therefore, the humanitarian security of IDPs requires a comprehensive approach that combines legal, social, economic, and psychological instruments of state policy.

International standards for the protection of internally displaced persons are primarily enshrined in the **Guiding Principles on Internal Displacement** adopted by the United Nations in 1998, as well as in documents of the Council of Europe, the Organization for Security and Co-operation in Europe (OSCE), and other international organizations. These instruments emphasize that the state bears primary responsibility for ensuring security, dignified living conditions, and the protection of the rights of citizens who have been forced to leave their places of permanent residence due to armed conflict (United Nations, 1998, pp. 5-6). By ratifying key international agreements, Ukraine has undertaken obligations to develop and implement state policy in the field of IDP protection in line with internationally recognized human rights standards.

National legislation of Ukraine also establishes the legal framework for ensuring the humanitarian security of internally displaced persons. In particular, the Law of Ukraine *«On Ensuring the Rights and Freedoms of Internally Displaced Persons»* of October 20, 2014 defines the legal status of IDPs and guarantees their rights to housing, employment, education, healthcare, and social protection (Law of Ukraine, 2014). At the same time, practical implementation of this law demonstrates the existence of significant institutional, financial, and administrative challenges that complicate the effective integration of IDPs into host communities and hinder their full participation in the social, economic, and cultural life of the country (Petrenko, 2022, pp. 90-92; Kolisnyk, 2022, pp. 60-62).

Relevance of the Study. The relevance of the research topic is determined by several important factors.First, internal displacement in Ukraine has become one of the largest in Europe since the Second World War, both in scale and in its socio-humanitarian consequences.Second, humanitarian security is directly and intrinsically linked to the preservation of the state's human potential, which is of critical importance for Ukraine's wartime resilience and post-war recovery. Third, ensuring adequate living conditions for internally displaced persons is a key factor in strengthening public trust in state institutions and serves as a prerequisite for maintaining social stability within society (Petrenko, 2022, p. 92).

Purpose of the Article. The purpose of this article is to identify the main priority directions of Ukraine's state policy in the field of humanitarian security of internally displaced persons under wartime conditions and to outline the key challenges that require urgent and comprehensive solutions.

Objectives of the Study. The main objectives of the scientific research are to:

- analyze the theoretical and legal foundations of the concept of «humanitarian security of internally displaced persons»;
- examine contemporary challenges and threats in this sphere;
- review Ukraine's national policy regarding the protection of the rights of internally displaced persons;
- identify priority directions and effective mechanisms for ensuring the humanitarian security of IDPs;
- formulate practical recommendations aimed at improving state policy in the field of humanitarian security of internally displaced persons.

Scientific novelty of the article lies in a comprehensive analysis of humanitarian security of internally displaced persons as a strategic priority of Ukraine's state policy aimed at preserving human resources under wartime conditions and during post-war recovery.

Within the national security system, humanitarian security as a scientific category occupies a special place. In academic literature, it is defined as a set of measures and mechanisms aimed at protecting individuals and society from threats related to fundamental rights, freedom of self-realization, access to education, culture, healthcare, social benefits, and the information space (Haiduk, 2020, pp. 14–16). Therefore, humanitarian security is considered a basic, human-centered dimension of national security.

The active development of the humanitarian security concept in international practice began in the late twentieth century, particularly after the publication of the Human Development Report by

the United Nations Development Programme in 1994. This report introduced and systematized the concept of human security, which encompasses economic, food, environmental, personal, political, and humanitarian dimensions (UNDP, 1994, p. 23). In the context of internally displaced persons, humanitarian security implies not only the provision of basic survival needs but, above all, the creation of conditions for social integration, preservation of human potential, and restoration of social stability.

Ukrainian scholars interpret humanitarian security as «a state of protection of individuals and society from internal and external threats in the humanitarian sphere, including education, culture, information space, social development, and human rights» (Lytvynenko, 2021, pp. 51-52). Accordingly, the content of humanitarian security directly correlates with the needs of internally displaced persons, who often face the loss of housing, social ties, and opportunities for the full realization of their rights.

In Ukraine, the regulatory and legal framework for the protection of internally displaced persons is based on a combination of international legal standards and national legislation.

At the international level, the key legal instruments include:

- the Guiding Principles on Internal Displacement (1998), which define the fundamental rights of internally displaced persons and the obligations of states to ensure their protection (United Nations, 1998);
- the European Convention on Human Rights (1950) and the case law of the European Court of Human Rights, which consistently emphasizes the obligation of states to protect individuals affected by armed conflicts;
- documents of the Organization for Security and Co-operation in Europe (OSCE) concerning internally displaced persons, which highlight the importance of a comprehensive approach to their social integration;
- the Global Compact for Safe, Orderly and Regular Migration (United Nations, 2018), which, although primarily focused on migration, contains provisions relevant to internal displacement caused by armed conflicts (United Nations, 2018, p. 44).

At the national level, legal regulation in the field of protection of internally displaced persons is represented by a set of constitutional norms, laws, and strategic documents.

In particular, the Constitution of Ukraine (Articles 3, 24, 47, and 48) establishes the principle of the priority of human rights and freedoms, equality of citizens before the law, and guarantees the right to housing, work, and social protection. The Law of Ukraine «On Ensuring the Rights and Freedoms of Internally Displaced Persons» (2014) defines the legal status of internally displaced persons and guarantees their right to social services, education, and healthcare (Law of Ukraine, 2014). In addition, the Law of Ukraine «On National Security of Ukraine» (2018) identifies humanitarian security as an integral component of national security.

An important role is also played by state strategic documents, in particular the Strategy for the Integration of Internally Displaced Persons and the Implementation of Long-Term Solutions to Internal Displacement until 2025, approved by the Resolution of the Cabinet of Ministers of Ukraine No. 831-r of July 28, 2021.

The protection of internally displaced persons is not only a social function of the state but also an essential element of national security. Even partial loss of control over the humanitarian sphere may lead to serious social disruptions, increased regional disparities, and rising social tensions. In this context, humanitarian security of internally displaced persons becomes a determining factor of internal stability and social consolidation of Ukrainian society under wartime conditions (Kolisnyk, 2022, pp. 61–62).

The analysis of Ukraine's state policy in the field of humanitarian security of internally displaced persons demonstrates that it is formed at the intersection of social policy, security strategies, and humanitarian approaches (Vlasenko, 2022, p. 47). Under conditions of war and large-scale population displacement, the state has faced the need for comprehensive adaptation of legal, institutional, and socio-economic mechanisms (IOM, 2023, p. 12).

The key regulatory document in this area remains the Law of Ukraine «On Ensuring the Rights and Freedoms of Internally Displaced Persons» (2014), which guarantees the right to social protection, housing, education, and employment (Law of Ukraine, 2014, p. 15). However, empirical evidence indicates that the existing legal framework requires continuous updating in order to respond to emerging challenges, particularly with regard to ensuring sustainable integration programs and long-term support mechanisms (OSCE/ODIHR, 2022, p. 24).

Housing and employment remain the most acute problems in the social protection and integration of internally displaced persons. Current state programs for rental compensation and preferential housing loans are implemented to a limited extent due to critical shortages of financial resources (Cabinet of Ministers of Ukraine, 2022, p. 12). At the same time, positive examples can be observed at the local level, where integration programs implemented by host communities contribute to mutual adaptation and strengthening social cohesion (Troshchynskyi & Syniak, 2021, pp. 84-85).

Modern technologies have expanded access to education for children and youth among internally displaced persons, and overall access is ensured; however, significant regional disparities persist (UNHCR, 2023, p. 15). In the healthcare sector, limited access to specialized medical services remains a key challenge, particularly in rural communities. On the labor market, internally displaced persons often face discrimination and a shortage of employment opportunities, which necessitates the introduction of state incentives and motivation mechanisms for employers (IOM, 2023, p. 18).

Psychological and humanitarian support constitutes one of the most important vectors of state policy toward internally displaced persons, as mass displacement, loss of housing, separation from family members, exposure to violence, and prolonged experience of war have generated an unprecedented level of psychological trauma among IDPs (UNICEF, 2023, p. 6). Numerous studies confirm that forced displacement is associated with increased risks of post-traumatic stress disorder, depression, anxiety, and social disadaptation, particularly among children, women, and elderly persons. In this context, humanitarian security cannot be reduced solely to material assistance, as psychological well-being is a fundamental precondition for social integration, employment, education, and active civic participation.

International organizations, including UNHCR, UNICEF, and the International Organization for Migration, play a crucial role in providing psychological assistance through specialized programs aimed at trauma recovery, psychosocial counseling, child protection, and community-based mental health support. These initiatives have significantly mitigated the most acute consequences of displacement and contributed to maintaining social resilience among affected populations. However, despite this extensive international engagement, the national system of psychosocial support in Ukraine remains fragmented, insufficiently institutionalized, and unevenly distributed across regions (OSCE/ODIHR, 2022, p. 36). The lack of trained specialists, stable funding mechanisms, and coordinated state strategies significantly limits the sustainability and long-term effectiveness of psychological assistance for IDPs.

International cooperation and civil society organizations provide a substantial share of humanitarian resources for internally displaced persons (UNHCR, 2023, p. 19). At the same time, a closer examination of the situation demonstrates that Ukrainian civil society plays a critically important role in the implementation of humanitarian support for IDPs. Through volunteer initiatives, non-governmental organizations, community centers, educational and cultural projects, civil society actors often respond more rapidly and flexibly to the needs of displaced persons than formal state institutions (Vlasenko, 2022, p. 53). These initiatives not only deliver direct assistance but also foster social cohesion, mutual trust, and participatory practices within host communities.

Civil society engagement contributes to strengthening humanitarian security by facilitating informal networks of support, promoting inclusive community development, and empowering IDPs as active participants rather than passive recipients of aid. Educational and cultural projects implemented

by non-governmental actors help preserve identity, prevent social isolation, and support the psychological recovery of displaced persons, particularly children and youth. Thus, cooperation between the state and civil society should be regarded as a strategic asset in the field of humanitarian security.

Nevertheless, a number of systemic challenges continue to significantly hinder the effective provision of humanitarian security for internally displaced persons. Among the key obstacles are insufficient funding and uneven distribution of resources between regions and communities (Cabinet of Ministers of Ukraine, 2022, p. 12). Bureaucratic barriers in accessing social services further complicate the situation, often resulting in delays, exclusion errors, and additional stress for vulnerable populations (OSCE/ODIHR, 2022, p. 40). Moreover, the absence of comprehensive long-term integration programs limits opportunities for sustainable inclusion of IDPs into host communities.

Another serious risk is secondary marginalization and social exclusion of internally displaced persons, which manifests in discrimination on the labor market, restricted access to housing, and weakened social ties (Troshchynskyi & Syniak, 2021, p. 88). Without targeted policies addressing these risks, humanitarian assistance may remain temporary and fail to transform displacement into a process of social reintegration.

The conducted research confirms that state policy in the field of humanitarian security of internally displaced persons requires a fundamental transformation–from short-term emergency support measures toward comprehensive long-term strategies focused on social integration, resilience building, and human capital preservation (IOM, 2023, p. 30). Such strategies should include coordinated housing policies, labor market integration, accessible healthcare and education, psychosocial support, and mechanisms for monitoring the evolving needs of IDPs.

Conclusion. Therefore, humanitarian security of internally displaced persons should be regarded not merely as a social obligation of the state but as a strategic priority of Ukraine's public policy under conditions of war and post-war recovery**.** The large-scale and prolonged nature of internal displacement has demonstrated that the humanitarian dimension of security directly affects national resilience, social cohesion, and the preservation of human capital, which are critical for the country's sustainable development.

The study confirms that effective state policy in the field of humanitarian security of IDPs must be systemic, coordinated, and human-centered**,** integrating legal, institutional, social, educational, informational, and psychological components. Addressing only the material needs of internally displaced persons cannot ensure their genuine security without guaranteeing access to education, healthcare, information, cultural heritage, employment opportunities, and mechanisms for meaningful participation in public life. In this regard, humanitarian security functions as a multidimensional framework that connects social protection with long-term integration and empowerment of displaced populations.

The analysis has shown that the legal and institutional integration of humanitarian security with other areas of state policy-particularly economic, social, information, and regional development policies – is a key prerequisite for overcoming fragmentation and inefficiency in the protection of IDPs. Strengthening coordination between central authorities, local self-government bodies, international organizations, and civil society actors is essential for transforming humanitarian assistance from short-term emergency support into sustainable solutions focused on integration and resilience.

Consequently, the theoretical and legal foundations of humanitarian security of internally displaced persons in Ukraine are based on a combination of international standards and national legal frameworks, which conceptualize humanitarian security as an integral component of national security. This approach requires a comprehensive, cross-sectoral, and rights-based policy model that prioritizes human dignity, social inclusion, and long-term stability.

The scientific value of this research lies in substantiating humanitarian security of internally displaced persons as a priority direction of state policy and in identifying key vectors for its transformation in response to wartime challenges. The findings of the article may serve as a basis for

further academic research, as well as for the improvement of national strategies, legislation, and practical mechanisms aimed at ensuring long-term humanitarian resilience and sustainable recovery of Ukraine.

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THE ROLE OF MILITARY POWER IN INTERCULTURAL CONFLICTS

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Abstract. Military power remains a decisive force in shaping international relations and conflict dynamics. However, the nature of conflicts in the 21st century reveals that they are not solely determined by material capabilities, cultural, ethnic, and religious factors increasingly intersect with military struggles. This article argues the complex relationship between military power and conflicts, with particular attention to the intercultural dimensions that often underlie or exacerbate violent confrontations. By drawing on theoretical approaches and historical as well as contemporary case studies, it argues that sustainable peace requires not only balanced military strategies but also the recognition and management of intercultural tensions. Military power has historically been central to the emergence and resolution of conflicts, yet many of these conflicts are deeply rooted in intercultural differences such as religion, ethnicity, and identity. This paper examines the intersection of military power and intercultural conflicts, highlighting their causes, dynamics, and implications for global security. By analyzing historical and contemporary cases, as well as theoretical approaches, it argues that the future of peace depends on both the responsible use of military power and the effective management of intercultural tensions.

Military power has long been one of the central pillars of statehood and international relations. It not only determines the security of nations but also influences the causes, dynamics, and outcomes of conflicts. While military strength may deter potential adversaries, it can also escalate tensions and trigger arms races. This article explores the relationship between military power and conflicts through historical examples, theoretical frameworks, and contemporary challenges, highlighting the implications for global peace and security.

Key words: military power, intercultural conflicts, cultural dimensions, international relations, global peace, global security.

Introduction. Military power and conflicts are deeply interconnected themes in international relations and political science. Military power and conflicts have always been central to human history, from ancient empires to modern nation-states. The traditional view emphasizes the ability of armed forces to secure sovereignty, deter aggression, and impose political will. Yet, conflicts are rarely driven by military considerations alone. Cultural differences, whether ethnic, linguistic, or religious, play a significant role in fueling violence (Banks, 2015; Huntington, 1996).

The intersection of military power and intercultural conflicts raises critical questions: Why do some cultural disputes escalate into wars? How do states employ military force to manage identity-based tensions? Can intercultural dialogue prevent armed clashes? Addressing these questions is crucial for understanding today's hybrid security landscape, where power politics and identity politics converge.

From a theoretical perspective, the study of military power has traditionally been dominated by realist approaches that prioritize material capabilities, deterrence, and the balance of power. However, contemporary conflicts demonstrate that the effectiveness of military force is closely linked to social legitimacy, cultural perception, and identity narratives within and across societies. Military interventions that ignore local cultural contexts often intensify resistance, strengthen radicalization, and undermine long-term stability. At the same time, cultural identities themselves are not static; they are shaped by historical memory, political discourse, and external pressures, including the presence of foreign military forces. In this sense, military power does not operate in a cultural vacuum but actively interacts with intercultural dynamics, reshaping identities and perceptions of "us" and "the

other." Moreover, globalization, digital communication, and mass migration have increased the visibility of cultural differences, transforming local identity disputes into transnational security concerns. As a result, modern conflicts increasingly combine conventional military operations with symbolic, informational, and psychological dimensions. Understanding military power solely in terms of weapons, troop numbers, or technological superiority is therefore insufficient. A comprehensive analysis must integrate cultural awareness, identity politics, and communication strategies into security thinking. This integrated perspective allows scholars and policymakers to act.

Discussion. Military power refers to the capacity of a state or actor to mobilize armed forces, deploy advanced weaponry, and sustain war efforts. It includes not only traditional ground, air, and naval forces but also nuclear deterrence, cyber warfare, and space-based capabilities (Galtung, 1996; Waltz, 1979).

There are the following types of conflicts:

- Inter-state conflicts: Wars between states often rooted in power rivalry (e.g., World Wars, Russia–Ukraine, etc.).
- Intra-state conflicts: Civil wars and insurgencies, often involving identity groups (e.g., Syria, Sudan, etc.).
- Hybrid conflicts: Blending conventional, irregular, and cyber operations.

The historical examples of the conflicts as follows:

- Cold War: A global standoff where military superiority maintained deterrence but fueled proxy wars.
- Iraq and Afghanistan: Demonstrated both the reach of U.S. military power and the difficulty of defeating asymmetric insurgencies.
- Russia–Ukraine: Illustrates how military aggression reshapes security orders and revives cultural-identity conflicts.

There is one more type of conflicts called intercultural conflicts. Intercultural conflicts occur when groups from different cultural backgrounds clash due to divergent values, beliefs, or identities. Key causes include (Mearsheimer, 2001; Ting-Toomey, 1999):

- Ethnic and religious divisions (e.g., Balkans, Middle East, etc).
- Migration and integration challenges (e.g., Islamophobia in Europe).
- Globalization and identity protection (resistance to cultural homogenization).
- Historical grievances rooted in colonialism or oppression.

Types of intercultural conflicts:

- Interpersonal: Workplace or community-level misunderstandings.
- Communal: Ethnic or religious tensions within a state.
- National: Minority–majority conflicts escalating into civil wars.
- International: Cultural and civilizational clashes shaping global politics.

Military power in intercultural conflicts often becomes the tool through which intercultural disputes escalate into full-scale wars. Some patterns include:

1. Ethnic wars

The Yugoslav Wars (1991–2001) were not merely geopolitical but also ethnic and religious conflicts where military power was mobilized along cultural lines (Serbs, Croats, Bosnians).

2. Religious conflicts

The Sunni–Shia divide in the Middle East shows how sectarian identities intersect with military struggles, with external powers arming rival groups.

3. Civil wars with cultural roots

The Rwandan Genocide (1994) stemmed from Hutu–Tutsi tensions, where cultural identities were militarized and exploited for political power.

4. Global terrorism

Groups like Al-Qaeda and ISIS mobilize intercultural grievances (religion, anti-Western sentiment) into asymmetric military campaigns against technologically superior states.

The theories of international relations have different standpoints concerning the role of military power in intercultural conflicts. The realism emphasizes that military power is the ultimate guarantor of security, but underestimates cultural and identity-based grievances. The liberalism argues that international institutions and dialogue can reduce both military and intercultural tensions. But the theory of constructivism stresses that conflicts are socially constructed, with cultural identities and perceptions shaping why disputes escalate (Waltz, 1979; Nye, 2011).

In recent years, the world has seen an increase in military spending and an intensification of the arms race. This tendency is particularly evident against the backdrop of intensifying strategic competition between major powers such as the United States, China and Russia. For instance, it is noted that the United States is increasing military spending and strengthening its military presence in various regions in order to maintain its global leadership.

The modern character of international relations faces the contemporary challenges as following:

- Hybrid Warfare: Modern conflicts combine hard power with cultural and informational dimensions, such as Russia's use of propaganda in Ukraine.
- Migration and Security: Refugee crises create cultural tensions within host societies, sometimes leading to militarized responses.
- Global Polarization: Narratives like Huntington's "Clash of Civilizations" risk becoming self-fulfilling if not countered with intercultural cooperation (Huntington, 1996; Nye, 2011).
- Technology and Culture: Artificial intelligence, cyber warfare, and digital propaganda magnify cultural divisions while reinforcing military power.

The contemporary challenges cause some policy implications such as integrating security and culture. Recent scholarship emphasizes that the relationship between military power and intercultural conflict has become increasingly complex in the last decade. Contemporary wars rarely remain confined to physical battlefields; instead, they unfold simultaneously in informational, digital, and cultural spaces, where narratives, symbols, and collective memories play a decisive role (Kaldor, 2018; Hoffman, 2018). Studies on strategic culture demonstrate that states interpret threats and the use of force through historically shaped cultural lenses, which influence doctrine, decision-making, and public support for war (Buzan & Acharya, 2022). Moreover, non-state actors actively exploit cultural grievances through social media, transnational networks, and ideological framing, transforming localized disputes into global security concerns (Williams, 2020). The rapid diffusion of emerging technologies, including artificial intelligence, autonomous weapons, and algorithmic surveillance, further reshapes how military power interacts with society (Nye, 2021). These tools enhance operational efficiency but also raise ethical dilemmas related to civilian harm, discrimination, and accountability, particularly in culturally diverse environments (UNDP, 2022). Recent research also highlights that excessive reliance on military solutions in identity-based conflicts often produces short-term control while undermining long-term legitimacy (Kaldor, 2018). Consequently, scholars increasingly advocate comprehensive security approaches that integrate defense policy with conflict prevention, inclusive governance, and intercultural dialogue (Buzan & Acharya, 2022; Williams, 2020). Empirical analyses of peace operations suggest that missions incorporating cultural mediation, local participation, and protection of minority rights achieve more durable outcomes than purely coercive interventions (UNDP, 2022). In this context, military power should be understood as one component within a broader governance framework rather than a standalone solution. Such an approach aligns with contemporary international security debates emphasizing human security, resilience, and norm-based order (Nye, 2021; Williams, 2020). Conflict management must combine military strategies with intercultural dialogue. At the same time conducting a preventive diplomacy is important – early

interventions in culturally divided societies can stop disputes from escalating militarily (Nye, 2011; Galtung, 1996). At the same time states should guide by inclusive governance provided protecting minority rights reduces the likelihood of militarized ethnic conflicts. And finally, peacebuilding should be established: Long-term stability requires reconciliation and intercultural education, not just ceasefire agreements.

Conclusion. In conclusion, military power remains indispensable in safeguarding sovereignty and deterring aggression. However, many modern conflicts demonstrate that cultural and identity-based grievances are the true drivers of violence. Military solutions alone cannot resolve such disputes. Sustainable peace depends on addressing both the hard power dimension of conflicts and the intercultural tensions that fuel them. The challenge for the 21st century lies in building an international order that balances defense with dialogue, deterrence with diplomacy, and strength with cultural sensitivity. Future security strategies must therefore move beyond reactive force and prioritize long-term prevention, education, and trust-building among culturally diverse societies. Integrating military planning with diplomacy, development, and intercultural communication can reduce misperceptions and limit escalation. Such an approach encourages responsible use of power, enhances legitimacy, and supports resilient peace architectures capable of adapting to global change. Ultimately, this balanced framework offers policymakers practical guidance for navigating complexity while avoiding cycles of violence and fostering cooperative international security environments worldwide sustainably.

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THEORY AND IMPROVEMENT OF PSYCHOLOGY

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CONTINUOUS SUPPORT PROGRAM FOR ORGANIZING PSYCHOLOGICAL SESSIONS WITH PARENTS BEFORE AND AFTER CHILDBIRTH

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Abstract. Providing parents with psychological support before and after birth plays an important role in ensuring their emotional and psychological well-being. The goal of this process is to reduce parents' stress and emotional tension, develop parenting skills, and create a healthy emotional bond with the baby. The program organizes individual and group meetings, provides parents with practical advice, relaxation and stress management techniques, as well as advice on developing communication skills with the baby.

Continuous psychological support increases parents' self-confidence, strengthens family dynamics, and contributes to the preservation of the psycho-emotional health of both parents and babies. At the same time, this approach allows for the early identification and resolution of emotional difficulties that parents may encounter. Thus, the initiative enhances the social and emotional well-being of families and supports the healthy development of children.

Key words: well-being, stress, emotion, psychological support, health.

Introduction. Problem statement. Pregnancy and the postpartum period involve not only physical but also significant psychological changes in a woman's life. One of the most common conditions is postpartum depression. According to Ayran San's 2019 report, one in every ten women worldwide experiences postpartum depression. A 2022 study published in The Lancet Global Health reports that the prevalence of postpartum depression ranges from 24% to 30% in low- and middle-income countries, while in high-income countries it is approximately 10% to 20% (4). Such psychological difficulties not only disrupt women's daily functioning but also negatively affect mother–child relationships. A weakening of the emotional bond between mother and child can lead to early separation, which may result in delays in social and behavioral development. This situation can also cause emotional stress for children, parents, and close relatives, increase tension within family relationships, disrupt mutual understanding, and lead to long-term emotional problems. At this stage, women face serious emotional strains due to both hormonal changes in their bodies and new social roles and lifestyle adjustments. As a result of these pressures, women may develop postpartum depression, anxiety and fear, chronic stress, and burnout. In some cases, postpartum trauma (PTSD) develops, which negatively affects a woman's daily life and her ability to fulfill the maternal role. In addition, difficulties arise in establishing a healthy emotional bond between mother and child, and the breastfeeding process is often accompanied by stress and anxiety. Insufficient social and family support further increases the woman's psychological burden and weakens her emotional stability. In Azerbaijan, the situation resembles this global picture. According to data from the State Statistical Committee for 2023, approximately 135,000 births are registered annually in the country (Hasanova, R.,, 2021). Although the vast majority of these births occur under medical supervision, psychological support services for the postpartum period are not systematically organized. While a limited number of private psychological support centers exist in major cities, such services are almost nonexistent in the

regions. Although there are currently no comprehensive official statistics on postpartum depression in Azerbaijan, specialists in the field observe that the problem is widespread across the country, similar to international indicators. Estimates suggest that less than one-third of women who give birth receive psychological assistance from professionals. This means that tens of thousands of women each year are left to cope with postpartum psychological problems on their own. Not seeking psychological help or delaying it can further worsen the problem. Mothers may begin to feel inadequate, incompetent, and worthless. If these difficulties are not identified early and supported through psychological intervention, mother–child relationships may deteriorate, family conflicts may escalate, and even divorces may occur. According to official statistics for 2024 in Azerbaijan, family disagreements and emotional incompatibility are among the main causes of divorce. Changes in gender roles within the family, the absence of shared parental responsibilities, and the failure to address psychological tensions in a timely manner are among the primary sources of these problems. Therefore, establishing and systematizing psychological support mechanisms during pregnancy and the postpartum period, strengthening women emotionally during this time, and psychologically preparing them for parental roles are of vital importance not only for mothers but also for family cohesion and the healthy development of the child. In recent years, both globally and in Azerbaijan, an increase in psychological distress within family relationships and a rise in divorce rates have been observed, with these trends affecting postpartum care. Research has demonstrated on a broad scale that growing psychological concerns within families, increasing divorce rates, and their impact on parents'– especially mothers'– emotional well-being during the postpartum period are significant. Increased tension in family relationships, insufficient psychological preparation, and the sense of "inadequacy" often encountered in the early stages of parenthood negatively affect the psychological well-being of both women and men. Parents' thoughts such as "I can't cope" or "I am not a good enough mother or father" stem not only from individual psychological states but also from family conflicts, weak social support, and low levels of emotional intelligence.

Purpose of the study. The main purpose of this study is to systematize the psychosocial support process from pregnancy through childbirth and the postpartum period, and to evaluate the effectiveness of psychological services provided to parents and newborns. The research aims to ensure that pregnant women are assessed by a psychologist regardless of individual risk factors, that decisions regarding the mode of delivery are made in a consultation format in coordination with a gynecologist, that parents' emotional states before and after childbirth are examined, and that psychological difficulties are identified and prevented at an early stage. To this end, comprehensive interventions are implemented to strengthen emotional preparedness during the prenatal period and to identify and address postpartum depression, anxiety, and bonding problems. At the same time, involving family members and close support networks in the process, strengthening the parent–child bond, and organizing pediatric psychological follow-up are among the core objectives of the study.

Methodology of the study. The study's methodology is based on a comprehensive, stage-based approach. The first stage covers the pregnancy period and includes psychological assessment, psychoeducational activities, and individual and joint sessions with parents. The assessment tools used at this stage include the Relationship Assessment Scale (RAS), the Parenting Expectations Questionnaire, and the Wijma Delivery Expectancy/Experience Questionnaire (W-DEQ). In addition, mothers and fathers are provided with brochures on breathing techniques for childbirth preparation and self-calming strategies for panic situations. The second stage focuses on the postpartum period. During this phase, the Mother-to-Infant Bonding Scale (MIBS), the Beck Depression Inventory (BDI), and the Postpartum Anxiety Scale are administered to assess the mother's emotional state. At the same time, parent–infant observation is conducted and bonding exercises–such as skin-to-skin contact, eye contact, and vocal interaction–are applied. This stage aims to identify problems such as postpartum depression, anxiety, burnout, postpartum trauma, and lack of social support.

The third stage involves pediatric psychological follow-up. At this stage, parent and child observation is carried out between the ages of 6 months and 2 years, the child's psychological development is monitored, and coordinated support sessions are held with the participation of both a psychologist and a pediatrician. This methodological approach aims to ensure both individual and family-based psychosocial support, to help parents establish a healthy emotional bond with their child, to reduce risk factors during the postpartum period, and to support the child's healthy psychological development.

The Edinburgh Postnatal Depression Scale (EPDS) is used to identify postpartum depressive symptoms in mothers at an early stage and to determine the severity of depression. The Mother-to-Infant Bonding Scale (MIBS) assesses the mother's emotional bonding with the infant and identifies bonding difficulties early on. Infant bonding exercises–skin-to-skin contact, eye contact, and vocal interaction–strengthen the emotional connection between parent and infant. The Beck Depression Inventory (BDI) measures the level of depressive symptoms in both mothers and fathers.

The Beck Depression Inventory (BDI) assesses depressive symptoms in both mothers and fathers and helps distinguish them from mild fatigue. The Postpartum Anxiety Scale identifies mothers' concerns related to feeding, health, sleep, and safety, and supports the development of individualized intervention plans. Bonding exercises with the infant–through skin-to-skin contact, eye contact, and vocal interaction–enhance mutual emotional connection between parents and infants. Meetings and seminars are conducted on the topic of "Maternal self-care and stress management."

According to data published by the World Health Organization (WHO) in 2019, more than 13% of women and approximately 10% of men experience postnatal depression or anxiety disorders during the postpartum period. These conditions may be accompanied by emotional distancing within family relationships, reduced emotional intimacy, weakened mutual understanding, and, ultimately, an increased risk of divorce. It is precisely during this period that ensuring emotional support for both partners, providing psychological education, and conducting individual counseling sessions become critically important. In Azerbaijan, these trends are also confirmed by statistical data. According to the State Statistical Committee's data for 2023, although 54,200 marriages were registered in the country, 21,688 divorces were recorded. This indicates that approximately one out of every three marriages ends in divorce, posing a serious threat to the stability of the family institution.

Finally, in the long-term perspective, such projects can be considered an investment in the psychological health of society. Preventing psychological problems through early intervention is extremely important in terms of reducing their subsequent social and economic consequences. A healthy family means a healthy child and a healthy future. As specialists working at Baku Medical Plaza and Diamond Center, we confidently state that we will continue to stand by families and provide them with psychological support at every stage before and after childbirth. Below, the short-term and long-term outcomes of the project are systematically outlined.

Objectives of the study. The objectives of the study are to identify women's emotional states, risk factors, and parenting expectations during pregnancy and the postpartum period. It is also intended to assess postpartum depression, anxiety, and bonding difficulties, as well as to observe parent–child interactions. In addition, one of the main objectives is to provide psychoeducational support to families by ensuring coordinated collaboration among psychologists, gynecologists, and pediatricians.

Short-term outcomes.

1. Reduction in maternal stress and anxiety

As a result of psychological support sessions conducted within the framework of the program, a reduction in emotional tension related to pregnancy and childbirth was observed. This had a positive impact on mothers' psychological well-being, supported their preparedness for the childbirth process, and facilitated the early formation of the mother–child bond.

2. Increased family resilience

Through individual and group psychological sessions, mutual understanding and emotional support between parents were strengthened. Families were observed to cope more effectively with daily stressors, and an improvement in joint decision-making skills was noted.

3. Awareness-raising

Training sessions and educational activities implemented within the framework of the project contributed to increasing psychological awareness among parents.

4. According to data published by the World Health Organization (WHO) in 2019, more than 13% of women and approximately 10% of men experience depression or anxiety disorders during the postpartum period. These conditions may be accompanied by emotional coldness in family relationships, increased emotional distance, weakened mutual understanding, and, consequently, a higher risk of divorce. During this period, providing emotional support, psychological education, and individual exercises for both partners is of great importance. These trends are also confirmed by statistical data from Azerbaijan. According to the State Statistical Committee's data for 2023, despite 54.2 thousand marriages being registered, 21,688 divorces were recorded. This shows that approximately one out of every three marriages ends in divorce, posing a serious threat to the stability of the family institution.

5. The global picture is also concerning. For example, in low- and middle-income countries, the average prevalence of postpartum depression is 24.7%.

6. In the modern era, the social and psychological well-being of families is recognized as one of the key conditions for the healthy development of society. In particular, the emotional and psychological well-being of new parents is crucial both for their personal well-being and for the healthy development of their infants. Before and after childbirth, parents may face various psychological challenges, including stress, anxiety, tension, fear, and lack of self-confidence. The timely resolution of these problems and the establishment of appropriate support mechanisms create the necessary conditions for parents to raise their children in a healthier and more secure environment.

Psychological science has demonstrated that continuous support before and after childbirth provides emotional stability for parents, enhances their ability to express themselves, and strengthens family relationships. This period is important not only for mothers but also for fathers. Research in psychological sciences has shown that sustained support during the prenatal and postnatal periods ensures parents' emotional stability, develops their self-expression skills, and strengthens family relationships. This period is significant not only for the mother's psychological well-being but also for the father's, as the formation of a healthy emotional bond with the infant is more effectively achieved through the joint involvement of both parents (Aliyeva, S., 2020).

Through the organized psychological sessions, parents are provided with practical guidance on stress management, appropriate expression of emotions, establishing an initial emotional bond with the infant, maintaining harmony within the family, and developing parenting skills. These sessions are conducted in both individual and group formats, enabling parents to exchange experiences with one another and learn through mutual interaction.

Ensuring the continuity of such programs is of great importance, as not only short-term but also long-term psychological support enhances parents' quality of life, strengthens trust among family members, and supports infants' psycho-emotional development. Ultimately, such initiatives serve not only individual families but also the social well-being of society as a whole.

Providing psychological support to parents before and after childbirth is considered one of the most important directions in modern psychology. The sessions organized during this period are of great significance both theoretically and practically. Parenthood is not merely a biological process; it is a life stage that requires profound psychological, social, and emotional responsibility.

Before childbirth, the psychological state of parents–especially the mother–plays a crucial role in the healthy development of the infant. During pregnancy, mothers experience various changes–

hormonal, emotional, and social–that affect their psychological well-being. Stress, fear, anxiety, and feelings of uncertainty are commonly observed during this period. In psychological sessions, parents are informed that these feelings are normal and are taught ways to cope with them. Relaxation techniques, proper breathing methods, and emotional self-regulation skills are particularly beneficial for both mothers and fathers during pregnancy (Babayeva, N., 2019).

After childbirth, both mothers and fathers enter a new stage of life. During this period, mothers often experience postpartum emotional strain or depression. Fathers may also feel stress and anxiety when faced with new responsibilities. Continuous psychological support is essential to prevent and manage such conditions. During sessions with psychologists, parents are guided on reducing the emotional burden associated with childcare, strengthening communication within the family, and providing mutual support.

Establishing an emotional bond between parents and the child is of special importance for the child's healthy psychological development. In the first months of life, infants perceive their parents' behaviors, facial expressions, and emotions and respond accordingly. If parents are under constant stress and anxiety, this may negatively affect the infant's emotional stability. During psychological sessions, parents are taught how to build warm relationships with their infants and to understand the importance of body language and emotional expression in communication.

Such negative emotional environments may adversely affect infants' emotional well-being. Psychological counseling helps parents develop affectionate interactions with their infants and recognize the significance of body language and emotional expression in communication.

Another important component of prenatal and postnatal psychological support is maintaining healthy family relationships. Parents' mutual understanding and supportive behavior help preserve family unity. In group sessions, parents share their experiences with other families and learn how others cope with similar challenges. This process provides both social support and increased self-confidence.

Continuous psychological support has a significant positive impact on improving parents' quality of life. Regular sessions help maintain emotional stability, increase resilience to stress, and strengthen mutual respect and understanding among family members. This approach also has a long-term positive effect on children's psycho-emotional well-being.

Such psychological support provided to parents is important not only for the family but also for the healthy development of society as a whole. Children who grow up in a psychologically healthy environment are more likely to become balanced, socially active, and responsible citizens in the future. Therefore, this program serves the overall well-being of both individuals and society.

Providing psychological support to parents before and after childbirth is considered one of the most important fields of psychology. The main aim of this support is to maintain parents' emotional stability, strengthen their parenting skills, and positively influence the healthy development of the infant. Through such programs, both mothers and fathers become more resilient to stress, anxiety, and emotional challenges they may encounter, while harmony and mutual understanding within family relationships are reinforced. In the modern context, psychological support is no longer limited to individual counseling; it is increasingly enriched by group sessions and family-oriented approaches. This enables parents to exchange experiences, share similar problems, and learn effective coping strategies.

International research demonstrates that prenatal and postnatal psychological support programs are essential for the well-being of both parents and infants. For example, in the United States and European countries, "Parental Support Programs" implemented during pregnancy and the postpartum period are widely used to reduce parents' emotional stress and strengthen family relationships. In Scandinavian countries such as Sweden, Norway, and Finland, specialized psychological support centers operate as part of family welfare policies. In these centers, parents regularly participate in psychological consultations before and after childbirth, where they are taught stress management techniques, family communication skills, and ways to establish emotional bonds with their infants.

In Canada, measures to prevent postpartum depression among mothers are implemented within the framework of "Antenatal Mental Health Programs." These programs offer both individual psychological counseling and group support. In the United Kingdom, the National Health Service (NHS) organizes specialized sessions for parents, providing both medical information and psychological support to help them better prepare for the childbirth process (Goodman, J. H., 2004).

Problem statement. International experience demonstrates that continuous support programs enhance not only the emotional health of families but also social stability. As a result of such initiatives, children grow up in healthier environments, their psychological stability improves, and future processes of social adaptation become easier. Providing parents with regular psychological support before and after childbirth is of strategic importance for both the family and society. Therefore, the expansion of similar programs, the training of psychological counselors, and the establishment of specialized centers with state support–drawing on international experience–can be considered an important necessity for Azerbaijan.

A comparative analysis of the Azerbaijani context and international experience shows that, although the provision of prenatal and postnatal psychological support to parents is recognized as important at both levels, there are differences in approaches and implementation mechanisms. Internationally, especially in developed countries, such support is regarded as a key component of public policy. In the United States, Canada, the United Kingdom, and the Scandinavian countries, comprehensive programs for parents are implemented by both governmental and non-governmental organizations. These programs place particular emphasis on psychological counseling, methods for coping with stress and anxiety, strengthening intra-family relationships, and the prevention of postpartum depression.

Although certain steps have been taken in Azerbaijan in this direction, the large-scale implementation of systematic programs remains limited. Psychological support services are mainly provided through individual initiatives, private clinics, and some community-based efforts. However, unlike international practice, there is limited use of state-supported specialized psychological counseling centers and family welfare programs. This reduces parents'–especially mothers'–opportunities to seek psychological assistance during the postpartum period (World Health Organization, 2019).

One of the main advantages of international programs is that they are not limited to individual counseling but also include group sessions, family-based training, and educational activities. This enables parents to exchange experiences and build social support networks. In Azerbaijan, such group-based support models remain underdeveloped.

Another important difference is that in Scandinavian countries, parental support programs are an integral part of state social policy and are considered accessible to all families. In Azerbaijan, by contrast, psychological support largely depends on individual initiatives, which limits its reach. In this context, the application of international experience offers significant opportunities to strengthen family well-being in Azerbaijan (Guliyev, T., 2022).

Based on comparative analysis and international experience, the need to develop state-supported, specialized parenting programs in Azerbaijan becomes evident. Such programs could not only enhance parents' emotional stability but also promote children's healthy development. Most importantly, these initiatives have the potential to strengthen family relationships and social stability within society.

Conclusion. In conclusion, the implementation of continuous support programs for prenatal and postnatal psychological consultations with parents is of strategic importance for family well-being and overall public health. Such programs contribute to reducing parental emotional stress, enhancing coping capacities in relation to stress and anxiety, and strengthening social adaptation processes. In particular, psychological difficulties experienced by mothers during the postpartum period require early identification and timely intervention.

Early diagnosis and appropriate psychological support play a crucial role in protecting the physical and mental health of both the mother and the infant, as well as in fostering a secure parent–child relationship.

International experience clearly demonstrates that sustained psychological support programs have a significant positive impact on individuals' social development, mental health, and the strengthening of interpersonal relationships. Successful models implemented in the United States, Canada, the United Kingdom, and the Scandinavian countries indicate that comprehensive psychological support initiatives represent one of the most effective instruments for enhancing societal well-being. The implementation of similar programs in Azerbaijan could facilitate the development of healthy social skills among parents and contribute to the creation of a supportive and nurturing social environment for children.

Therefore, the establishment and expansion of continuous psychological support programs serve not only individual well-being but also the broader social welfare of society. In this context, the expansion of existing initiatives, the creation of state-supported specialized centers, the strengthening of professional training frameworks, and the development of accessible support mechanisms for parents should be regarded as essential and urgent priorities in contemporary social and health policy.

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PSYCHOLOGICAL FACTORS OF FORMATION OF COMMUNICATIVE-DIALOGICAL COMPETENCE IN THE EDUCATIONAL ENVIRONMENT

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Abstract. The article presents a theoretical and psychological analysis and the results of a pilot empirical study of the formation of communicative and dialogical competence in the context of the transformation of the educational environment. The aim of the study is to substantiate the psychological factors and conditions for the development of dialogical interaction. The empirical study was conducted with the involvement of higher education applicants (n = 48) using methods for diagnosing empathy, reflexivity and communicative tendencies. Descriptive statistics and Student's t-test were used. A predominantly average level of development of communicative and dialogical competence was revealed, as well as a statistically significant increase in empathy and reflexivity indicators after the introduction of psychologically justified conditions for the development of dialogue. The results confirm the effectiveness of integrating training and reflective practices into the educational process and outline the prospects for further research.

Key words: dialogical interaction, psychological factors, empathy, reflexivity, educational environment, subject-subject relations, psychological conditions.

Introduction. The modern cultural and educational space is undergoing profound transformations caused by the processes of digitalization, globalization, socio-cultural instability and rethinking the role of education as an environment not only for the transfer of knowledge, but also for the formation of a personality capable of effective interpersonal and intercultural interaction. In the context of such changes, the problem of developing communicative and dialogical competence as an integral psychological characteristic of a personality, which provides the ability to productive dialogue, mutual understanding, reflection and empathetic interaction, becomes particularly important.

From a psychological point of view, communicative and dialogical competence is not only a set of speech skills, but also a complex system of cognitive, emotional-regulatory and motivational components that determine the quality of social contacts, the effectiveness of joint activities and the psychological stability of the individual in the conditions of social changes. The transformation of the cultural and educational space actualizes new challenges: the growth of communicative loads, the fragmentation of social ties, the change in forms of interaction and the increase in the risk of communicative barriers, which requires scientifically based approaches to the formation of dialogical skills.

This problem becomes particularly relevant in the educational environment, where communicative and dialogical competence becomes a key condition for psychologically safe interaction, the development of the subjectivity of participants in the educational process and the formation of a culture of dialogue as a value orientation of modern education.

Despite the significant number of studies devoted to the problems of communication, interpersonal interaction and the psychology of dialogue, the psychological principles of the formation of communicative and dialogical competence in the context of the transformation of the cultural and educational space are not sufficiently systematized in modern scientific literature. The issue of harmonizing the theoretical provisions of the psychology of dialogue with real socio-cultural and educational changes that affect the formation of the communicative behavior of the individual remains unresolved.

The problem lies in identifying and substantiating psychological mechanisms, conditions and factors that contribute to or complicate the development of communicative and dialogical competence in the context of growing social uncertainty, information overload and changes in traditional forms of educational interaction. The lack of a holistic psychological approach to this issue limits the possibilities of effective implementation of competency-oriented educational practices and reduces the potential of education as a space for the development of a culture of dialogue.

The purpose of the article is to provide theoretical and psychological justification and empirical verification of psychological factors and conditions for the formation of communicative and dialogical competence of an individual in the context of the transformation of the educational environment.

To achieve the goal, the article provides for the solution of the following tasks:

1. To analyze psychological approaches to understanding communicative and dialogical competence in the modern educational environment.

2. To identify the structural components of communicative and dialogical competence and their psychological characteristics.

3. To empirically investigate the level of formation of empathy, reflexivity and communicative inclinations in higher education applicants.

4. To assess the effectiveness of psychologically grounded conditions for the development of dialogical interaction in the educational process.

It is assumed that the introduction of psychologically sound conditions for the development of dialogical interaction (reflective exercises, empathically oriented communication, training elements) will contribute to increasing the level of communicative and dialogical competence of participants in the educational process.

Materials and methods of the study. The empirical study is aimed at identifying the level of development of communicative and dialogical competence in the conditions of transformation of the cultural and educational space. 48 higher education applicants aged 19-23 years participated in the study. A set of psychodiagnostic techniques was used to diagnose the components of competence:

– Methodology for diagnosing the level of empathic abilities (A. Mehrabyan, N. Epstein).

– Methodology for determining the level of personality reflexivity (A. Karpov).

– Questionnaire of communicative and organizational inclinations (KOS-2).

– Data processing was carried out using descriptive statistics methods (mean values, percentage distribution). To check the dynamics of indicators after the introduction of psychologically justified conditions, Students t-test for dependent samples was used.

Research results. The results of the primary diagnostics showed that the majority of participants had an average level of development of communicative and dialogical competence. In particular:

– Average level of empathic abilities – in 54.2% of respondents, low – in 29.1%, high – in 16.7%.

– The level of personal reflexivity of average indicators – in 58.3% of participants, which indicates a partial ability to be aware of ones own communicative actions and their impact on interaction with the Other.

– Communicative inclinations of average level were observed in 47.9% of respondents, which confirms the presence of potential for dialogical interaction under the condition of special psychological support.

After the implementation of psychologically grounded conditions for the development of dialogical interaction (reflective exercises, group discussions, training elements), a statistically significant increase in empathy and reflexivity indicators was recorded ($p \leq 0.05$).

Discussion of results. The obtained results confirm the key role of empathy and reflection in the formation of communicative and dialogical competence. The dynamics of indicators after the implementation of psychologically grounded conditions is consistent with the results of previous studies by Ukrainian and foreign scientists, who emphasize the importance of subject-subject interaction in the educational environment.

The increase in the level of dialogical readiness is explained by the activation of internal dialogue, the development of the ability to accept the position of the Other and the formation of a psychologically safe space of interaction. This confirms the expediency of integrating training and facilitation methods into modern educational practice.

The modern cultural and educational space appears as a dynamic, fragmented and multicultural system, within which the intensification of communications is not always accompanied by the development of a full-fledged dialogue. Excess information flows, digital mediation of interaction and increased social tension complicate the processes of emotional resonance and deep reflection, which gradually reduces the level of empathy and contributes to the formation of simplified cognitive schemes for the perception of social reality.

Under such conditions, the level of situational and personal anxiety increases, communicative barriers (avoidance of dialogue, protective forms of interaction) become actualized and the willingness to accept another position decreases. This complicates the formation of sustainable communicative and dialogical competence.

Despite the fact that traditional approaches to communicative competence are based mainly on speech skills, going beyond linguistic interpretation is important for revealing the essence of interpersonal interaction. Classics of the philosophy of dialogue – Martin Buber, Hans-Georg Gadamer – emphasize that dialogicity is not reduced to the exchange of information, but is a process of joint discovery of meanings, in which interlocutors mutually recognize and transform each other through interaction.

In the psychological dimension, communicative and dialogical competence appears as an integrative personal formation that encompasses cognitive (understanding of meanings), emotional and value (empathy, acceptance of the Other) and behavioral (ability to dialogical interaction) components. Modern Ukrainian research also emphasizes the integral nature of competence, including emotional and value sensitivity, the ability to effectively interact and self-reflect, necessary for the professional activity of a psychologist and interpersonal interactions.

Research by O. Tsaryk (2022) shows that communicative competence acts as an integrative personal resource that ensures the success of communicative activity and the development of the personality as a whole. O. Yukhymets (2017) defines communicative competence of future specialists as an integrative combination of knowledge, skills and value-containing qualities that ensure effective interaction in professional activity. E. Ivashkevych (2022) emphasizes the psychological content of the communicative and competence approach, in which dialogicity and reflection of thinking are integral components. The analysis of I. Boyko (2024) shows that the content and structure of communicative competence are changing under the influence of modern educational standards, including digital forms of communication and interpersonal interaction. Therefore, the psychological analysis of the transformation of the cultural and educational space involves studying how changes in the structure, technologies and value orientations of the educational environment affect the cognitive, emotional-value and behavioral aspects of the personality. Such an analysis allows us to understand how the new conditions of educational interaction form the abilities for self-reflection, adaptive behavior and effective communication. Of course, psychological transformations of the educational space require flexibility, self-reflection and the ability to dialogue from the individual. In this sense, communicative and dialogical competence appears as an integrative psychological phenomenon that combines understanding of meanings, empathy and the ability to constructive interaction.

Thus, in the psychological dimension, communicative and dialogical competence is not reduced to speech skills, but appears as an integrative personal formation that encompasses cognitive (understanding of meanings), emotional and value (empathy, acceptance of the Other) and behavioral (ability to dialogical interaction). In Ukrainian scientific discourse, communicative and dialogical competence is considered not only as a speech or behavioral ability, but as an integral result of the

educational process, which encompasses value-semantic, cognitive and socio-psychological components of interaction (Avdymyrets, 2022:65). In particular, according to N. Avdymyrets, communicative and dialogical competence is a specific way of relating to the world and the Other, which is formed through educational practices and is transformed in the process of personality formation in a human-centric environment.

In the modern cultural and educational space, which is undergoing significant transformations under the influence of digitalization, interactive technologies and interdisciplinary approaches, the development of the personality depends on the presence of special psychological conditions and mechanisms that ensure effective communication and dialogue. The psychological conditions for the formation of communicative and dialogical competence are: cognitive (developed critical thinking, the ability to reflect and predict the behavior of others); emotional and value (empathy, emotional regulation, motivation for interaction); behavioral and social (active listening, constructive interaction in a group, readiness to resolve conflicts); as well as educational and environmental (favorable psychological climate, interactive and collaborative practices) (Avdymyrets, 2020:65; Ivashkevych & Kurytsia, 2022:43).

Mechanisms for competence formation include cognitive processes (reflection, introspection, interactive learning through role-playing games and cases), emotional-value integration (empathic inclusion, value awareness of dialogue, psychological preparation for difficult situations), behavioral implementation (dialogical practice, group projects, online debates) and metapsychological mechanisms (motivation for self-development, internal dialogue, correction of interaction strategy) (Tsaryk, 2022:41; Boyko, 2024).

It is clear that communicative and dialogical competence appears as an integrative psychological phenomenon that combines cognitive, emotional-value and behavioral components of the personality, provides the ability for constructive dialogue and effective interpersonal interaction, creating conditions for adaptation and self-development in a transformed cultural and educational environment (Avdymyrets, 2020:65; Yukhymets, 2017; Ivashkevych & Kurytsia, 2022:43).

The formation of communicative and dialogical competence in the modern transformed cultural and educational space requires the use of practical psychological methods that contribute to the development of dialogical interaction and reflective communication. Such methods include social-psychological trainings that provide active group work on the skills of listening, expressing one's own opinion, responding empathetically, and resolving conflicts constructively (Solovey, 2024; Levytska, 2024).

A significant role is played by game and simulation exercises that allow practicing real communicative situations, forming skills of emotion regulation and internal reflection (Deynychenko, 2017/2019). Psychodiagnostic practices allow assessing individual communicative characteristics, identifying strengths and weaknesses, and adapting training programs to the needs of a specific group (Buchynska & Shumska, 2012). Interactive forms of learning, such as collective projects, debates, and case studies, stimulate active participation in interpersonal interaction, promote the development of argumentation, listening to others, and the ability to communicate flexibly (Levytska, 2024).

Psychological practice creates favorable conditions for the development of dialogue, which is the central mechanism of the integrative nature of communicative and dialogical competence, combining cognitive, emotional-value and behavioral components. This ensures the readiness of the individual for effective interaction, self-development and adaptation in the conditions of transformation of the cultural and educational environment (Solovey, 2024; Deynichenko, 2017/2019; Buchynska & Shumska, 2012).

Thus, psychological practice, which includes socio-psychological training, game methods, psychodiagnostics and interactive communicative exercises, creates favorable conditions for the development of dialogue as an interpersonal process and contributes to the integrative content of communicative-dialogical competence, which combines cognitive, emotional-value and behavioral components.

Considering the above-mentioned possibilities of psychological practice and their influence on the formation of dialogical competences, it can be argued that the effective development of communicative-dialogical competence in the conditions of transformation of the cultural-educational space requires a holistic integration of theoretical knowledge with practical forms of activity. Such an approach not only expands the possibilities of adaptation to new challenges of the educational environment, but also provides systematic training of the individual as an active subject of dialogue, capable of flexible communication, empathy and reflective interaction.

Conclusions. The article theoretically and empirically substantiates the psychological principles of the formation of communicative and dialogical competence in the context of the transformation of the cultural and educational space. It is established that:

– firstly, the development of empathy, reflection and subject-subject interaction are key psychological factors of effective dialogue;

– secondly, the formation of competence in the modern cultural and educational space requires practical psychological methods that contribute to the development of dialogical interaction and reflective communication: socio-psychological trainings, game and simulation exercises, psychodiagnostic practices and interactive teaching methods (collective projects, disputes, cases);

– thirdly, psychological practice creates favorable conditions for the development of dialogue as a central mechanism of the integrative nature of communicative and dialogical competence, combining cognitive, emotional-value and behavioral components and ensuring the individuals readiness for effective interaction, self-development and adaptation.

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DIAGNOSIS OF INTERNAL FACTORS IN THE DEVELOPMENT OF THE FOUNDATIONS OF FUTURE SPECIALISTS' PROFESSIONAL CULTURE

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Abstract. This article theoretically substantiates and empirically validates the structuring of factors influencing the development of the professional culture of future preschool teachers into two generalized groups: internal and external. The methodological toolkit employed in the study included the «Temperament Formula» test, the «Thinking Styles» assessment, an author-developed express test for evaluating the ingenuity of future preschool teachers, a chain associative experiment, and systematic pedagogical observation. The aggregated diagnostic results indicate a predominance of medium to sufficiently developed internal characteristics, while also identifying a subgroup of students with insufficiently developed subjective qualities, highlighting the need for targeted pedagogical support.The study concludes that the activation of internal factors – particularly individual psychological and subjective ones – is a key condition for forming the foundations of professional culture in future preschool teachers.

Key words: professional culture; developmental factors; future preschool teachers; individual psychological characteristics; subjectivity; ingenuity; communicative competence.

Introduction. The formation of the professional culture of future preschool education teachers is largely determined by the development of their internal characteristics, which constitute the foundation of professional readiness, resilience, and effectiveness of pedagogical activity. These characteristics determine the future educator's ability to adapt to contemporary educational conditions, engage in reflective practice, and select effective strategies for interaction with children, colleagues, and parents. In this context, the diagnosis of internal factors acquires particular significance, as it makes it possible to identify individual resources and potential areas for development among students.

An in-depth study of the internal factors of professional formation is also relevant because it is precisely these factors that shape the trajectory of personal and professional growth of future preschool education teachers. Awareness of one's own temperament, dominant thinking style, level of subjectivity, and communicative competence facilitates the mastery of effective professional strategies and the formation of conscious motivation for self-improvement. Diagnosing these characteristics allows for the timely identification of difficulties, adjustment of individual educational trajectories, and provision of targeted psychological and pedagogical support. Therefore, we believe that the study of internal factors in the development of professional culture is a necessary prerequisite for training a competitive, competent, and psychologically mature preschool education specialist.

Analysis of Recent Research and Publications. In psychological and pedagogical literature, the most widely recognized classification of factors is their division into external and internal ones. Researchers attribute psychological characteristics – such as motives, needs, and interests – to the group of internal factors. These characteristics occupy a significant place in the structure of personality, permeating its orientation, character, emotions, abilities, and mental processes. External factors, in turn, are understood as the conditions under which a particular activity takes place. Thus, in her studies of the professional identity of future specialists, O. Radzimovska classifies professional self-development and the emotional coloring of professional formation as internal factors, while the activation of professional development and involvement in practical activity are considered external factors (Radzimovs′ka, 2012: 10).

A different perspective on the classification of factors is presented by researchers Iryna and Ihor Androshchuk, who identified three groups of factors influencing the formation of pedagogical mastery in future teachers: socio-economic, personal, and technological. We agree with the scholars' view that socio-economic factors affect applicants at the stage of admission to higher education institutions, whereas personal and technological factors become decisive during the learning process within the chosen educational program (Androshchuk & Androshchuk, 2020: 32. doi: 10.32835/2707-3092.2020.21.29-34) (in Ukrainian).

Of particular importance to our study are the scientific works of A. Bazylenko, who, at the micro level, identified favorable factors of social activity among contemporary students. These include: "psychological attitudes, including those shaped by family traditions of active social engagement; a sense of belonging as a full-fledged member of the student group; positive personal experience; developed social abilities; a striving for self-realization, self-knowledge, and self-creation; a desire to experience personal value; awareness of positive resources and opportunities for their actualization; belief in one's own integrity; self-encouragement; well-developed perceptions of social activity; the ability to demonstrate initiative; and the ability for self-regulation" (Bazylénko, 2018: 9).

The purpose of the article is to present the results of diagnosing the internal factors influencing the development of the foundations of professional culture among future preschool education teachers.

Presentation of the Main Material. In our study, the factors contributing to the development of the professional culture of future preschool education teachers are divided into *two groups: internal and external*. Taking into account the scientific research outlined above, the factors influencing the development of the foundations of professional culture of future preschool education teachers were identified and characterized.

Thus, the first group includes the following *internal factors*:

- *Individual psychological factors*, such as temperament characteristics, personality traits, mental processes, individual thinking style, personal qualities, and general and special abilities of the learner, among others.
- *Subject-related factors*, which encompass the learner's ability to demonstrate ingenuity in overcoming life contradictions and challenges; to construct a personal model of interaction with the world; to transform oneself and the surrounding environment through practical and theoretical activity; and to achieve set goals of professional and personal growth. This group also includes communicative competence, understood as the future preschool teacher's ability to establish effective communication with participants in the educational process based on humanistic principles.

The second group comprises the following *external factors* identified in the study:

- *Educational factors*, including the organization and improvement of a reflective educational environment aimed at forming general and professional competencies of future preschool education teachers.
- *Social factors*, such as the ability to build one's own model of relationships with others – children, colleagues, and parents – as well as leadership tendencies and organizational skills.

• *Sociocultural factors*, which involve the influence of culture, education, politics, and the information environment on the selection and achievement of life goals, the assimilation of transcendental values, and the realization of professional and personal qualities and strategies in future pedagogical activity (Hal′chenko, 2024).

To diagnose *individual psychological factors* – one of the key constructs of which is temperament – the "Temperament Formula" test (adapted by U. Mykhailyshyn) was selected, along with systematic observation of students during the educational process and extracurricular activities. To assess individual thinking styles, the "Thinking Styles" test developed by R. Bremson and A. Harrison was employed.

To diagnose subject-related factors, particularly the ingenuity of future preschool education teachers as an indicator of their subjectivity, an express test titled *Ingenuity of Future Preschool Education Teachers as the Most Vivid Manifestation of Creativity* (authored by V. Halchenko) was developed. Observation of students during educational and extracurricular activities was also applied. To assess communicative competence as another subject-related factor, a chain associative experiment was conducted.

The diagnosis of the individual psychological internal factor contributing to the development of the foundations of professional culture among future preschool education teachers made it possible to determine the role of temperament in professional culture development. The "Temperament Formula" test (adapted by U. Mykhailyshyn) was administered for this purpose. Respondents from both the experimental and control groups identified their dominant temperament type and, using the temperament formula, determined the role of other temperament types that are also present in each individual but to a lesser extent. Based on self-analysis, each future preschool education teacher became aware of how various characteristics of the dominant temperament type can be applied in future professional activity–for establishing relationships with children, parents, and colleagues; achieving set goals; creating new projects; overcoming difficulties; and regulating destructive emotions.

We also consider it important that students realized the possibility of restraining or transforming negative manifestations of temperament through personal qualities – such as aggressiveness in choleric individuals, impulsiveness in sanguine individuals, excessive sensitivity in melancholic individuals, and outward indifference in phlegmatic individuals.

We believe that awareness of one's temperament type will serve as a stimulus for determining one's individual thinking style. As a diagnostic tool for identifying individual thinking style – considered the next construct within the individual psychological factors influencing the development of the foundations of professional culture of future preschool education teachers – we selected the "Thinking Styles" methodology (an adapted version of the well-known InQ questionnaire developed by R. Bremson and A. Harrison in 1984) (Harrison & Bramson, 1984).

The results of diagnosing students are presented in Figure 1.

Figure 1 shows that the majority of respondents demonstrate an idealistic thinking style. Such participants are characterized by a heightened interest in human values, moral issues, goals, and needs. They are able to take subjective and social factors into account when making decisions, tend to smooth out contradictions, and are inclined toward intuitive and holistic judgments without engaging in detailed problem analysis. We believe that this thinking style will stimulate the development of spiritual and value-based orientations of future preschool education teachers.

Students with a pragmatic thinking style accounted for 24.12% of the respondents. These individuals rely on their own experience, use readily available materials and information, and strive to obtain practical results as quickly as possible. They demonstrate a keen sense of situational awareness, successfully choose appropriate behavioral tactics, and exhibit flexibility and adaptability. In our view, such future specialists are more likely to develop coping strategies of impunitive behavior as a component of the conative-instrumental component of professional culture.

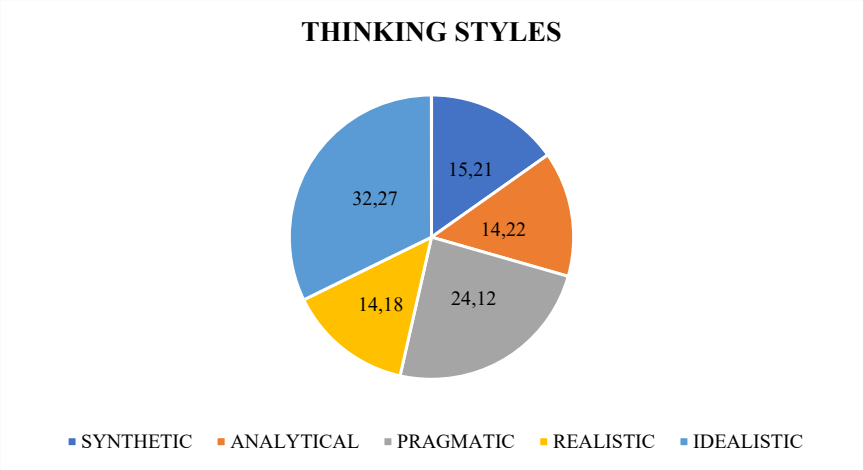

Fig. 1. Results of a study of the thinking styles of future preschool teachers

Future preschool education teachers with a synthetic thinking style, who constituted 15.21% of the sample, are capable of creating something new and original by combining dissimilar viewpoints and ideas. They tend to conduct mental experiments, formulate theories and personal conclusions, and favor change for its own sake. We assume that this thinking style will activate the life-creative potential as one of the foundations of the professional culture of future preschool education teachers.

Respondents with an analytical thinking style (14.22%) are inclined toward a logical and thorough approach to problem solving. Before making decisions, they develop step-by-step plans and attempt to collect as much information and supporting evidence as possible. They perceive the world as rational, structured, and predictable. We assume that this thinking style will contribute to a more thorough acquisition of the knowledge necessary for future professional activity, thereby stimulating the cognitive component of the emotional-cognitive component of the professional culture of future specialists.

The smallest proportion of respondents (14.18%) demonstrated a realistic thinking style. These individuals are focused exclusively on recognizing facts; from their perspective, only that which can be directly perceived through the senses is considered “real.” For such students, a problem arises when they see and understand that something is incorrect, in which case they attempt to correct it immediately. In our opinion, this thinking style will be particularly beneficial for future preschool education teachers in the process of direct interaction with young children, especially in facilitating the development of children’s sensory-perceptual skills.

Thus, identifying the dominant thinking style, as well as temperament type, enabled students to better understand how they can achieve their goals and how to act in solving tasks related to their future professional activity. Taking into account the results of the study, we are firmly convinced that the activation of individual psychological factors has a positive impact on the development of the foundations of professional culture of future preschool education teachers (Hal′chenko, 2022).

The results of diagnosing the next group of internal factors influencing the development of the foundations of professional culture – namely, subject-related factors, with ingenuity of the future educator as the central construct – proved to be particularly interesting. It was found that only 23.43% of respondents demonstrated a high level of ingenuity in both educational and professional activities as well as in personal life. Such individuals are capable of life creation; they can prevent personal disharmony, maintain balance between the external and internal worlds, make free choices, independently take decisions and assume responsibility, design their own life projects, restructure their lives for the better, and continuously engage in self-improvement and self-realization.

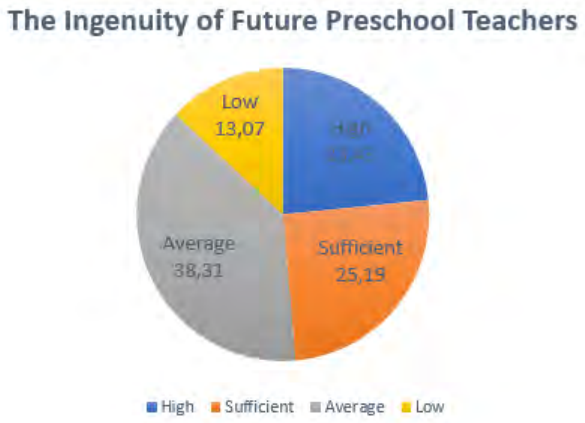

Fig. 2. Research on ingenuity as an internal (subjective) factor in the development of the foundations of professional culture of future preschool educators

Figure 2 shows that 23.43% of respondents demonstrated a high level of ingenuity. The characteristics of the high level were described above. A sufficient level was identified in 25.19% of students. These individuals are characterized by the ability to demonstrate ingenuity periodically, make independent decisions, and design life projects. Future educators with a medium level are occasionally capable of demonstrating ingenuity; however, they experience difficulties in assuming responsibility, planning, and creating new projects, while manifestations of striving for self-improvement are intermittent. Respondents with a average level accounted for 38.31%. As for the low level of ingenuity, 13.07% of students were identified. Such future educators are characterized by isolated manifestations of ingenuity in the educational process, an inability to make responsible decisions, a lack of motivation to create new projects, adherence to a fixed life scenario, and frequent manifestations of disharmony and aggression.

Thus, it should be noted that the majority of respondents demonstrated sufficient and medium levels of ingenuity; however, a group of students with a low level of ingenuity was also identified, who particularly require teacher support. Such students experience difficulties studying in the conditions of a rapidly changing reality that demands flexibility, mobility, independence, and creativity. We believe that the comprehensive psychological program developed by us will contribute to increasing their level of ingenuity, which, in turn, will activate life-creative potential as one of the foundations for the development of the professional culture of future preschool education teachers (Hal′chenko, 2022).

An important subject-related factor in the development of the foundations of professional culture of future preschool education teachers is *communicative competence*. Effective work of a preschool educator is impossible without speech activity, through which dialogical communication with children based on humanistic principles is carried out. Therefore, an associative experiment was conducted to study future preschool educators' understanding of the essence of the concept *"*communicative competence*"* and its role in their future professional activity. A chain associative experiment (theoretically substantiated in the previous subsection) was applied. Within 10 minutes, students were asked to write definition-associations to the concept "communicative competence of a future preschool educator."

The analysis of stimuli was carried out in the following aspects: conceptual, emotional-motivational, and behavioral. Psycholinguistic analysis of the conceptual aspect revealed significant differences in the production of definition-associations between second-year and fourth-year students. In response to the verbal stimulus "communicative competence of a future preschool educator," second-year students reacted as follows: 65% produced from one to three verbal reactions, while

35% produced up to five reactions. The nuclear reactions of the associative field included communication, interaction, and contact. Identification of this concept with professional activity was observed in linguistic consciousness, as evidenced by such recorded expressions as "communication with children," "interaction with pupils," and "contact with parents."

The diagnostic results of fourth-year students differed significantly from those of second-year students due to their greater professional training experience. In response to the same stimulus, 45% of fourth-year students produced from one to five verbal reactions, while 55% produced more than five reactions. Their associative responses included such nuclear reactions as dialogue, professionalism, mutual understanding, empathy, and social perception. These reactions indicate a deeper awareness among fourth-year students of the key components of communicative competence, as well as the informational and emotional-motivational content of this concept.

Examples of interpretations of the concept "communicative competence of a future preschool educator" provided by second-year bachelor's students show that they understand it primarily as the ability to establish contacts with other people (in the professional context – with children, parents, and colleagues). In contrast, definitions provided by fourth-year students reflect a more comprehensive and complex understanding of the concept. They interpret communicative competence as the ability to interact with others based on understanding, dialogue, empathetic attitude, recognition of personality as the highest value, and the use of acquired professional knowledge, skills, abilities, and speech culture.

Thus, for fourth-year respondents, the emotional-motivational aspect became the leading factor in understanding the concept of communicative competence, unlike second-year students, for whom the conceptual component predominated. It was also found that senior students, unlike second-year students, interpret communicative competence by revealing perceptual-reflexive and behavioral aspects. In their view, "communicative competence is the ability of an individual to understand the inner world of another person and improve one's own, thereby enhancing interpersonal interaction." Therefore, we consider it appropriate to include perceptual-reflexive and behavioral components in the structure of the associative field of the stimulus "communicative competence of a future preschool educator."

The analysis of scientific literature and the conducted experimental study demonstrated that students of different academic years understand the concept of communicative competence differently. Significant differences were also identified in the nuclear reactions of their associative fields to the stimulus "communicative competence." From a psycholinguistic perspective, the process of understanding speech in general and the essence of concepts in particular occurs differently across groups of individuals, depending on their prior experience (Hal′chenko, 2022).

In particular, similar views are expressed by Chinese researchers from Beijing Normal University – Zhang Xiaohong, Zaizhu Han, and Yanchao Bi – who argue that sensory experience is a key factor for concrete concepts, while linguistic contexts play a crucial role in abstract concepts. According to the scholars, concrete concepts contain more perceptual features, whereas abstract concepts contain more functional ones (Zhang, Han, & Bi, 2013: 1060. doi:10.1017/S0142716412000124 (in Ukrainian).

The validity of our research findings is confirmed by numerous studies conducted by contemporary and earlier psychologists and psycholinguists. Mechanisms of speech perception, comprehension, and production have been studied by both domestic and international scholars (O. Zahorodnia, O. Kornieieva, H. Lysenko, T. Nedashkivska, among others). According to researchers, speech perception is the process of establishing meaning hidden behind the external form of utterances. This process occurs at two levels: first as perception itself, and subsequently as comprehension of the speech message (Nedashkivska, & Zahorodnia, 2015).

Further confirmation is found in the works of T. Nedashkivska (2015), who, through lexical and terminological analysis, identified the following components of the semantic core: action, activity, ability to perform activity, implementation, result, behavior, behavioral standards, skills, knowledge, abilities, structure, experience, qualification, contacts, values, evaluation, range of issues, capabili-

ties, readiness, individual qualities and properties, specific tasks, professional functions, state, quality, property, spiritual, mental, and physical correspondence (Nedashkivska, & Zahorodnia, 2015: 44).

Contemporary researchers such as T. Sharavara, A. Kotsur, N. Syzonenko, and Ya. Tahiltseva include value-motivational, logical-conceptual, and emotional-affective domains in the structure of the associative field of the stimulus "competence." Experimental results indicate the dominance of the cognitive level of mental representations over the emotional one, as well as a relative balance between logical-conceptual and value-motivational domains (Sharavara, Kotsur, Syzoneno, & Tahiltseva, 2018: 351).

The use of a free associative experiment made it possible to record verbal reactions in the linguistic consciousness of future preschool educators that reflect their understanding of the essence of the concept "communicative competence of a future preschool educator" as an important indicator of professional culture. The nuclear reactions of fourth-year students were significantly richer in content than those of second-year students. The associative field structure included conceptual, emotional-motivational, perceptual-reflexive, and behavioral domains, with the latter two manifested only among senior students. A significant achievement of the study is the identification of the dominance of the emotional-motivational aspect combined with the perceptual-reflexive one in the linguistic consciousness of senior students, which constitutes an essential component of professional culture development.

Thus, communicative competence is one of the key professional skills of a future preschool education teacher. It involves the ability to establish dialogical, humanistically oriented communication with children, parents, and colleagues, understand the inner world of another person, and reveal one's own through mastering social perception skills. Considering the above, we are convinced that activating subject-related factors significantly enhances the development of the foundations of professional culture.

Conclusions. The conducted study enabled a systematic analysis of the structure and content of internal factors determining the level of formation of the foundations of professional culture among future preschool education teachers. It was established that individual psychological characteristics (temperament, character traits, thinking style, cognitive processes) and subject-related characteristics (ingenuity, communicative competence, capacity for self-regulation and reflection) serve as key prerequisites for professional growth and effective pedagogical activity. A differentiated analysis of diagnostic results revealed heterogeneity in the levels of development of these factors among students, indicating the need for targeted individualization of educational influence.

The obtained empirical data confirmed the importance of timely identification of internal resources and potential limitations of future educators. This provides a basis for developing psychological and pedagogical interventions aimed at activating their personal and professional development. The proposed set of psychodiagnostic methods proved effective in identifying individual developmental trajectories and outlining directions for further work on enhancing the foundations of professional culture. Therefore, the study of internal factors has proven to be an important tool for improving the quality of training of future preschool education teachers, contributing to the formation of psychologically mature, competent, and creatively active professionals.

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PSYCHOLOGICAL PECULIARITIES OF POLICE PROFESSIONAL ACTS UNDER MARTIAL LAW

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Abstract. The article provides a comprehensive theoretical analysis of the impact of the full-scale armed aggression of the Russian Federation against Ukraine on the radical transformation of the content, forms, and psychological conditions of performing official duties by employees of the National Police of Ukraine. The scientific necessity of studying the psychological specifics of professional activity in the extreme conditions of martial law is substantiated as a fundamental factor for ensuring operational efficiency, a high level of stress resistance, and the adequacy of law enforcement agencies' response to the dynamic threats of wartime. Through a critical synthesis of a wide array of contemporary scientific research, it has been established that the professional actions of police officers during this period are characterized by extreme psycho-emotional tension. This tension is caused not only by the performance of traditional policing functions but also by direct involvement in assault and search operations in combat zones, participation in territorial defense, and the elimination of catastrophic consequences of armed conflict or emergency situations of a military nature.

A systematic analysis of the dynamics of personal psychological resources in situations as close as possible to combat has been conducted, where the permanent real threat to life and health acts as a catalyst for profound distress, depressive states, and chronic emotional exhaustion of personnel. Particular attention within the study is paid to the specifics of the psycho-traumatic experience that law enforcement officers acquire while working at sites of mass casualties, conducting complex exhumation activities, and meticulously documenting the atrocities and war crimes of the aggressor. It is established that such experience often exceeds the bounds of ordinary human perception and requires specialized mechanisms of psychological processing.

It is proved that the personality transformations of a police officer in wartime conditions have a direct and indirect determination on the quality of professional actions, influencing the moral-volitional sphere and cognitive decision-making processes. The conclusions formulated as a result of the analysis are of significant practical importance for the development and implementation of innovative psychological rehabilitation and decompression programs. The proposed approaches are aimed at improving internal self-control mechanisms, optimizing intellectual processes in critical situations, preventing professional deformation, and accelerating the adaptation of personnel to the high-risk environment of combat operations.

Key words: stress factor, psychological readiness, mental health, psycho-emotional tension, extreme activity, professional transformation, martial law, cognitive resources, law enforcement, psychological rehabilitation.

Introduction. The exercise of official powers under the legal regime of martial law causes a fundamental transformation of the life and professional environment of police officers, manifesting in significant changes to their personal structure, behavioral patterns, and the nature of social interaction. War-driven modifications of the individual psychological properties of law enforcement officers exert both direct and indirect influence on the quality of operational and service tasks. Modern challenges place increased demands not only on the cognitive component of professional suitability–namely, knowledge, skills, and abilities–but also on fundamental psychophysiological resources, the value-volitional sphere, and the moral and ethical qualities of the individual. In the context of a systemic crisis, the specialist's ability to effectively process exogenous and endogenous factors becomes particularly

relevant, ensuring adequate professional response and maintaining mental integrity under ыextreme operational conditions.

Analysis of recent research and publications. The issue of the psychological characteristics of police officers' professional actions under martial law is at the center of attention of many domestic and foreign scholars. An analysis of scientific work indicates that the theoretical and methodological foundations of this problem were developed by: O. Bandurka, V. Barko, M. Budanova, O. Yevdokimova, Z. Kisil, O. Kudermina, V. Lefterov, S. Miroshnychenko, V. Osiodlo, I. Okhrimenko, O. Timchenko, D. Shvets, A. Bártolo, E. Kolthoff, A. Marques, J. Noppe, F. Passos, A. Pereira, C. Queirós, C. da Silva, Van der Vijver Kees, A. Verhage, and others. Although the scientific community has devoted considerable attention to the psychology of law enforcement, the aspect of implementing professional police actions directly under martial law remains an under-researched segment. Analysis of the scientific literature suggests that despite existing studies, there is currently a lack of fundamental works that comprehensively highlight the influence of psychological specifics on the architectonics of police officers' professional actions precisely under martial law. Existing theoretical developments do not always correlate with today's dynamic and high-risk scenarios.

Presentation of the main material. According to research by S. Boichuk (2022), the performance of professional duties by police officers under martial law often occurs in situations of total or partial information deficiency and operational uncertainty. The specifics of service actions during this period are determined by the intensity and tension of circumstances, the dynamics of which are difficult to predict, yet which require an immediate and adequate response from law enforcement officers. The author emphasizes that the involvement of police officers in measures to counter the aggressor actualizes the need for a high level of psychological adaptability. A key factor in this context is tolerance for uncertainty–specifically, the individual's ability to maintain resilience in the face of unpredictable challenges, make balanced decisions under data shortages, and predict outcomes without losing psychological equilibrium or experiencing a sense of helplessness in unstructured situations.

Complementing this view, R. Bera (2021) emphasizes that extreme conditions of professional activity inevitably lead to psycho-emotional overload. The necessity for ultimate self-sacrifice and the constant mobilization of resources becomes an additional source of tension, accompanied by the destruction of the sense of basic security, internal imbalance, and value conflicts. Prolonged exposure to stress factors forms a state of permanent fatigue, which consequently determines a decrease in work capacity, deterioration in the quality of task performance, the development of professional maladaptation, and may lead to staff turnover due to resignation from service.

Analyzing the specifics of police activity, O. Skliar *et al.* (2022) classify key stressors as a combination of critical life circumstances, prolonged traumatic experience, and permanent professional problems. The authors highlight that since 2022, law enforcement officers have been working in a mode of extreme emotional tension caused by a high degree of danger and the principle of «continuity» of task performance, the intensity of which significantly exceeds usual standards. Specific pressure factors include the constant wearing of personal body armor and weapons, direct participation in rescue operations, providing pre-medical aid under fire, and interacting with a large number of armed individuals. The exceptional nature of the conditions–ranging from the threat of ballistic missile strikes to frequent air raid sirens–provokes a state of physical exhaustion, professional burnout, and the occurrence of panic attacks, which ultimately determines a decrease in motivation and the overall level of professional efficiency.

Supporting the thesis regarding the extremity of conditions, Z. Kisil & R.-V. Kisil (2021) note that police officers' presence in the liminal space "between life and death" serves as a basis for the development of acute and chronic forms of PTSD, unmotivated affective behavior, and depressive states. In turn, C**.** Porter & P. Gavin (2024) emphasize the cumulative effect of organizational and operational stressors, which systematically erode the mental health of personnel.

Assessing potential personality metamorphoses, M. Budanova (2023) asserts that martial law acts as an objective factor complicating professional activity, where the nationwide experience of war is superimposed onto ordinary psychological challenges. The researcher draws an important conclusion regarding the ambivalence of individual transformations: they can be positive (tempering resilience) or create serious obstacles to the officer's further reintegration into society upon returning to peacetime conditions. Military actions fundamentally transform the professional space of a law enforcement officer, changing their personality traits, habitual forms of behavior, and modes of social interaction. Such profound metamorphoses directly affect the quality of the officer's implementation of their primary function–ensuring and protecting the rights and freedoms of Ukrainian citizens.

As M. Lohvynenko (2024) points out, the professional activity of police officers in modern realities is inextricably linked with the escalation of various forms of crime: from organized and transnational crime to terrorist acts, corruption, cybercrime, and illegal arms trafficking. A further critical factor for Ukraine has been the full-scale armed aggression of the Russian Federation. The combination of these factors determines an increase in the number of fatalities, injuries, and disabilities among personnel, as well as provokes the development of psychosomatic disorders and suicidal activity. The intensification of violence directly threatens the safety of police officers' lives, creating critical risks to their mental health and professional capacity.

The armed aggression of the Russian Federation against Ukraine has radically increased the requirements for the professional fitness of police officers. In particular, the ability to perform tasks under enemy fire, interact with a large number of victims, and withstand extreme emotional tension while documenting war crimes has become paramount. Pursuant to the Decree of the President of Ukraine No. 64/2022 (2022), units of the National Police are involved in measures to repel armed aggression and ensure the territorial integrity of the state.

From the first days of martial law, police officers have been exercising their functions in zones of direct combat, in de-occupied territories, and in frontline settlements. Certain units participate directly in the liberation of territories, while others maintain law and order under constant artillery and mortar fire, provide aid to victims, and conduct the procedural documentation of the aggressor's atrocities.

S. Boichuk (2023) emphasizes that even in the initial stage of the invasion, police officers performed territorial defense tasks in besieged cities, escorted humanitarian convoys, conducted civilian evacuations, and countered the enemy's sabotage and reconnaissance groups. Performing professional actions in situations closely resembling combat, under the condition of a constant threat to life, causes a critical exhaustion of psychological resources. Continuous mental tension becomes a source of distress, depressive states, and deep emotional exhaustion. Particularly traumatic is the experience of working at mass casualty sites and participating in exhumation activities; the impressions gained therein exceed the limits of normative human perception and require specialized psychological processing mechanisms.

Service activity of police officers in areas close to combat zones is characterized by a constant existential threat due to the risks of enemy attacks and the use of lethal force (S. Maksymenko & V. Medvediev (2018)). While in peacetime, scholars such as D. Shvets (2024), O. Sashurina (2023), R. Wijayanti & H. Fauzi (2020) viewed extreme circumstances as a probabilistic element of professional activity, under war conditions, high-risk situations have been transformed into the permanent background for the implementation of official tasks.

Under martial law conditions, the quality of professional duty performance directly determines the preservation of human life and health. The war imposes uncompromising demands on representatives of the security and defense sector, obliging them to make critical decisions under severe time and information deficits. In such circumstances, the objectivity of the cognitive assessment of a situation and an adequate reflection of one's own resources in opposition to enemy forces acquire unprecedented significance.

Sharing the position of V. Barko *et al.* (2022) regarding the definition of policing as an «extremely stressful profession» it is necessary to note a deficit of empirical data concerning the impact of specific military stressors on tactical decision-making mechanisms. Researchers Z. Kisil & R. Kisil (2021) emphasize the unpredictability of daily challenges and acts of violence faced by law enforcement officers. Specifically, P. Galani, *et al.* (2021) detail these threats through resistance during arrest, physical aggression, and fire confrontation. In this context, L. Kryvoruchko *et al.* (2023) differentiate the concepts of "acute" and "chronic" stress, noting that while the latter is traditionally researched more actively, under war conditions, it is the acute stress reactions during task performance that require primary attention.

The results of empirical studies by I. Okhrimenko *et al.* (2023) indicate that professional stress among law enforcement officers is a consequence of an imbalance between the internal resources of the individual and the exogenous demands of the professional environment. This view is reinforced by C. Porter & P. Gavin (2024), who state that the cumulative impact of organizational and operational stressors negatively affects even the most resilient employees, who often conceal mental health difficulties.

According to the findings of Z. Kisil & H. Katolyk (2022), prolonged presence in a stress-inducing environment without proper psychological satisfaction leads to the development of psychosomatic disorders and maladaptive behavioral patterns. This manifests in the destruction of interpersonal bonds, the narrowing of the circle of social interaction, violations of official discipline, and the formation of addictions. Further escalation of delinquent behavior is driven by cognitive exhaustion: under excessive workload, prognostic potential deteriorates, the worldview horizon narrows, and behavior loses the necessary flexibility and adaptability.

Permanent and fundamental organizational transformations act as an additional stress-inducing factor in the context of martial law. Performing professional tasks in a high-risk environment determines negative consequences for police officers at physiological, emotional, and behavioral levels. At the same time, stress reactions can be both immediate (short-term) and prolonged (cumulative) in nature, progressing over time into more complex forms of psychological maladaptation.

According to the views of S. Boichuk (2022), in the realities of wartime, an individual's readiness for change acquires the status of an exceptional professional quality. It is a fundamental property that ensures the survival and effectiveness of a law enforcement officer, as practically every service scenario under such conditions contains elements of uncertainty and unpredictability. In turn, O. Skliar *et al.* (2022) emphasize the need to implement innovative approaches to the psychological training of personnel. Empirical data indicate that a significant portion of employees proved to be psychologically unprepared for full-scale combat operations. This manifested in difficulties making operational decisions in critical situations, as well as in psychological barriers regarding the use of lethal force. In the minds of many law enforcement officers, an acute internal conflict arose between the need to act according to legal requirements and the intense emotional pressure of the situation.

Summarizing these challenges, M. Budanova (2023) underscores that armed conflict exerts an objectively negative influence on the professional space of a law enforcement officer. This is positioned as a profound transformation of individual psychological traits, a revision of habitual behaviors, and a change in the very specifics of social interactions. A police officer's professional action in these conditions ceases to be merely a technical execution of a function, becoming instead the result of a complex internal struggle and adaptation to the extreme conditions of existence.

To comprehensively understand the nature of the difficulties arising in the professional activity of police officers under martial law, it is necessary to classify the key stress factors according to their functional content:

1. *Cumulative traumatic experience*. The nature of the service involves systematic interaction with manifestations of violence, human tragedies, and lethality. Despite professional readiness for such

situations, traumatic events have the capacity to accumulate (cumulative effect), which, without proper psychological correction, becomes a pathogenic basis for the development of Post-Traumatic Stress Disorder (PTSD) and the destruction of personal resources.

2. *High responsibility in operational and tactical decision-making.* In the realities of war, law enforcement officers are forced to make instantaneous decisions in life-threatening circumstances. The critical significance of such actions and their potential irreversibility (eventual consequences) create intense cognitive and emotional burdens, as the price of an error in extreme conditions is maximally high.

3. *Intense public scrutiny in the digital environment.* The current state of technological development allows for the recording and public analysis of any action taken by a police officer. Constantly being under close public scrutiny (the «microscope effect») acts as an additional source of stress. This is felt particularly acutely in situations involving reputational risks, where officers face bias, public condemnation, or distorted interpretations of their professional actions.

According to the findings of Z. Kisil *et al.* (2019), the consequences of police professional activity under martial law–in the absence of proper psychological support and timely intervention–acquire a critical and sometimes tragic character. Extreme stressors associated with constant risk determine the development of a range of negative states:

1. *Formation of addictive behav*ior. The use of psychoactive substances (alcohol, narcotic drugs, or precursors) often becomes a destructive coping mechanism for some officers–an attempt to independently manage traumatic experiences. This inevitably leads to the formation of persistent chemical dependency and professional degradation.

2. *Depressive disorders***.** The cumulative effect of prolonged exposure to traumatic events, combined with high-intensity service pressure, provokes the development of clinical depression. This state is characterized by a loss of motivation, emotional inhibition, and a decrease in the overall resilience of the law enforcement officer.

3. *Occupational burnout syndrome.* Chronic psycho-emotional overload and a lack of organizational support lead to burnout, which manifests through emotional exhaustion, depersonalization (a cynical attitude toward the objects of one's activity), and reduced personal accomplishment (a sense of professional inefficiency).

4. *Suicidal risk.* The most tragic consequence is the emergence of suicidal ideation. The inability to independently process intense psychological pain and a sense of hopelessness lead to a loss of meaning in both professional and personal existence, making suicide prevention a primary task for psychological services.

It should be noted that under martial law, the issues of optimizing psychological training and professional support for personnel, as well as strengthening team cohesion during service tasks, acquire particular relevance. To ensure high performance, a police officer must possess a multifunctional set of competencies: from the ability to de-escalate social tension and maintain public order to the effective execution of functions declared in Article 2 of the Law of Ukraine «On the National Police» under extremely difficult circumstances. Maintaining high standards of professional activity while preserving mental health requires exceptional resilience to wartime challenges from employees.

Conclusions. Summarizing the results of the theoretical analysis of scientific works by domestic and foreign researchers, it should be stated that the professional activity of police officers under martial law is characterized by exceptional complexity, multifactorial nature, and extreme conditions. The specifics of law enforcement professional actions during this period are determined not only by the intensity of psycho-emotional stress but also by the necessity of performing tasks in liminal «borderline» situations of life and death, which require the immediate recording and processing of traumatic events. The synergistic interaction of stress-inducing determinants–among which high-risk actions and high responsibility for the consequences of decisions hold a key place–shifts the officer's psyche into a mode of unprecedented mobilization of internal resources.

Theoretical study of modern aspects of police activity has allowed for the identification of fundamental features of unit functioning in wartime, including: a persistent need to apply enforcement measures under conditions of uncertainty, the ability to operate effectively under information and time deficits, and a readiness for the transformation of professional roles. The performance of daily duties in this context is inevitably accompanied by high levels of psychological traumatization and conflict-prone situations, as the wartime framework forces law enforcement officers to simultaneously counter domestic crime and participate directly in national defense measures. In light of this, the strategic vector for further scientific research should be the development of effective practical recommendations aimed at strengthening the stress resistance and psychological endurance of personnel, which is a prerequisite for maintaining the professional effectiveness of the police during a prolonged military conflict.

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ARCHAISMS AND DIALECTAL ELEMENTS IN THE LANGUAGE OF ASHUG POETRY (BASED ON THE MATERIAL OF AZERBAIJANI AND TURKISH LANGUAGES)

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Abstract. The article is devoted to the study of linguistic characteristics of the Ashug poetry of the Turkic peoples, with an emphasis on archaisms and dialectal elements in the languages of the Azerbaijani and Turkish traditions. Ashug poetry is an oral folk art form in which the content, style and language are closely related to the historical development of Turkic societies. Based on examples from the oral and fixed traditions of Ashug works, the functions of archaic lexemes and dialectisms, their role in reflecting cultural memory, regional identity and stylistic originality are analyzed. The mechanisms of preservation of archaisms in the oral tradition, the influence of dialects on the poetic language, as well as the comparative perspective between Azerbaijani and Turkish Ashug poetry are considered. The main conclusions show that archaisms and dialectal elements are not only a linguistic phenomenon, but also a bridge between history, ethnography and art form.

Key words: Ashug poetry, archaisms, dialectisms, Azerbaijani language, Turkish language, oral tradition, Turkic poetry.

Introduction. Ashug poetry is an ancient oral form of folk artistic speech of the Turkic peoples (Azerbaijanis, Turks, etc.), combining melodic performance, narration and poetic word. The Ashug tradition is an important cultural phenomenon that has survived to the present day in both Azerbaijan and Turkey. Ashug creates not only artistic content, but also forms a special linguistic style rich in dialectisms, archaisms and regional linguistic features. Archaisms are obsolete words and expressions that have lost their relevance in the modern literary language, but remain in special styles or regional varieties of the language. Archaism serves as a stylistic marker, enhancing the historical flavor and cultural depth of the text.

Ashug poetry is one of the most striking and significant elements of the traditional oral culture of the Turkic peoples, which is especially flourishing among Azerbaijanis, Turks, as well as other Turkic and Caucasian peoples. It embodies the rich heritage of folklore, musical traditions, as well as the specific philosophy and worldview of the people. An important part of the Ashug tradition is the interaction of language, music and poetry, thus creating a complex and multi-layered cultural form.

Ashug poetry has deep historical and cultural roots in Azerbaijan. In its classical form, it appeared at the turn of the XI–XII centuries in rural areas, but reached its heyday in the XVI–XVII centuries, becoming an integral part of folk culture. The Ashugs in Azerbaijan, like the wandering poets and musicians of other nations, played an important role in spreading folk legends, historical stories, and even political satire.

Famous Azerbaijani ashugs, such as Hasen-Zade (mid-16th century) or Mahsum-Guli (17th century), created not only poems, but also epics describing the most important historical events, battles and love. It was an important means of propaganda and education among the people.

On the other hand, at that time, archaisms and dialectisms were of particular importance for poetry, which were used to enhance the emotional coloring of works and the connection with folk traditions. Unlike the official literary languages, the Ashug language was imbued with folk speech, which made

it possible to preserve the specifics of local dialects and vocabulary. This has also made Ashug poetry an important tool for cultural identification.

The study of archaisms and dialectisms in the language of Ashug poetry requires a broader understanding of these lexical categories and their role in language development. Archaisms and dialectal elements are two key aspects that largely determine the stylistic uniqueness and cultural significance of the Ashug language. Understanding these terms and their functions helps to reveal more deeply the poetic language of the Ashugs and to understand the mechanisms of preservation of traditional oral literature (Jafarova, 2018).

Archaisms are obsolete language elements that have fallen out of active use in modern language, but persist in certain styles or genres. In the language of folk poetry, including Ashug, archaisms play an important role, allowing them to preserve historical depth and reflect the features of the ancient language and culture.

Archaisms can be lexical, phonetic, morphological, and syntactic.

Lexical archaisms are obsolete words and expressions that have fallen out of use, but remain in a poetic context (for example, words denoting ancient professions, elements of culture or everyday life). Phonetic archaisms are changes in the sound of words that were characteristic of old forms of language (for example, the preservation of old vowels or consonants).

Morphological archaisms are ancient forms of word formation and declension that are not used in the modern language. Syntactic archaisms are old sentence structures that were common in the classical language, but have lost popularity in everyday speech. In the context of Ashug poetry, archaisms play several key roles:

It plays a stylistic role, giving the work an antique touch and creating an atmosphere of the past. The function of cultural memory, preserving ancient words and expressions that become a kind of "memory" of peoples. Semantic load, introducing additional meanings into poetry, which are perceived in the context of the historical or mythological past.

An example of lexical archaism in Azerbaijani Ashug poetry:

"Alçah" (descendant, descendants) is a word that is no longer found in the modern language, but in Ashug poetry it is often used to express an idealized attitude towards the native land, ancestors and historical memory.

Dialectisms are linguistic elements characteristic of certain dialects or regional variants of a language, which may include lexical, phonetic, morphological, and syntactic features inherent in local language variants.

Dialectisms occupy a special place in the language of Ashug poetry, as they not only help to enhance the expressiveness and imagery of the text, but also serve as an important cultural indicator, reflecting the local identity, geographical affiliation and social status of the speaker.

Dialectisms can be lexical, i.e. words specific only to certain regions or groups; phonetic, i.e. differences in pronunciation of words in different parts of the country; morphological, reflecting the peculiarities of declension, conjugation, and word formation; syntactic, which includes specific constructions of sentences and phrases. An example of dialecticism in Azerbaijani Ashug poetry:

"Xəndəx" (big pit) – this word was used in certain regions of Azerbaijan and could be perceived as a dialectal expression.

In Ashug poetry, dialectisms are often used to:

Creating a regional flavor by emphasizing the features of a particular region or area. Emphasizing the folk nature of poetry, since Ashug poetry expressed the folk spirit to a greater extent than official literary traditions.

The functions of enhancing emotional coloring – dialecticisms give the work a more lively and organic sound, reflecting the folk speech. Although archaisms and dialectisms are different phenomena, they are closely intertwined in the language of Ashug poetry. Archaisms, as ancient elements

of language, preserve the mythological, historical and philosophical depth in the works, while dialectisms reflect folk and regional peculiarities, giving the works a lively sound. The combination of archaisms and dialectisms makes it possible to preserve and transmit cultural heritage through language and poetry, ensuring continuity between generations. Enrich the imagery and emotional richness of the works, creating a unique style and atmosphere. To reflect the folk spirit in the language, which allows listeners or readers to feel not only the poetic beauty, but also the connection with tradition, history and nature.

As a result, the combination of these two linguistic elements allows Ashug poetry to be deeply national and universal at the same time. This combination contributes to the fact that Ashug poetry not only conveys important social and cultural values, but also serves as an important link between the past and the present.

The purpose of the study. The purpose of the article is to show the role and significance of archaisms and dialectisms in Turkic linguistics.

Analysis of the latest relevant research and publications. Modern research, such as the work of F. Jafarova (Jafarova, 2018), M. Gasimli (Gasimli, 2008), Z. Korkmaz (Korkmaz, 2009), as well as the works of famous researchers of Turkish folk poetry A.Dundes (Dundes, 2008), emphasize the importance of studying archaisms and dialectisms in the context of folk poetry. These studies help to identify the lexical features of various geographical and cultural groups, as well as to show how the language system changes in the context of oral tradition.

Azerbaijan and Turkey are actively exploring not only the lexical and phonetic features of Ashug poetry, but also the influence of dialects on the forms and meters used in poetry. Archaisms and dialectisms in such works provide an opportunity to understand how language serves as a living reflection of the cultural, social and historical realities of each period.

Dialectisms are lexical and grammatical elements characteristic of certain regional dialects or dialects. In oral poetry, dialectisms serve as markers of locality, strengthen the connection with the vernacular and enhance the expressiveness of artistic expression. In the traditions of open folk art, it is through dialectal features that the regional spirit of poetry is transmitted.

Azerbaijani Ashug poetry is an integral part of the folklore heritage, combining the genres of gereyli, goshma, tajnis and other meters characteristic of folk art.

The language of Ashug poetry is traditionally based on folk speech, enriched with regional elements, which often preserve archaic words and expressions that have fallen out of active use in the literary language, but live in oral creativity.

Presenting main material. In the Turkish popular poetic tradition, ashug/ashık occupies an important place as a performer of poetry and music. Poetic forms include hikâye, a combination of prose narrative and song poetry.

Turkish Ashug poetry also retains elements of folk speech, including dialectisms and archaisms, especially in regional variants of the language. This reflects the diversity of modern Turkish dialects and the historical influence of the medieval linguistic tradition.

Lexical archaisms in the language of Ashug poetry play an important role, because they not only serve as a stylistic tool, but are also an important component of the cultural and linguistic identity of the Turkic peoples. These words and expressions, which have been ousted from active use in the modern language, are preserved in the folklore tradition, especially in such a genre as Ashug poetry. They allow you to create a special atmosphere reflecting the historical and cultural specifics of different eras, and also function as “living monuments” of bygone times.

In Ashug poetry, lexical archaisms are often found, i.e. words that have lost their popularity in the literary language, but remain in the stable repertoire of traditional poetry.

Examples of such words are recorded in a study on the archaisms of Nakhchivan dialects reflecting the ancient forms of the Turkic lexicon (typical archaisms: alchakh, yey, eppek, etc.). (Gunay, 1999)

Archaisms are used by Ashugs purposefully to create a historical and emotional effect, enhance the musicality of the verse and connect with tradition. They also serve as markers of the oral origin of the work. Archaisms are language elements that have become obsolete as a result of natural language development, but continue to be preserved in specialized styles such as literature, folklore, and poetry. In the context of Ashug poetry, archaisms perform several functions:

Stylistic function – they create a special poetic style, enhancing the emotional perception of the text.

Cultural and historical function – archaisms in the Ashug language are often traces of ancient forms of the language, preserving traditions and cultural features of past eras. Aesthetic function – in combination with the melody and rhythm of poetry, archaisms enhance its sound and imagery, giving the work a special flavor and depth (Reinhard, Reinhard, 1984).

In Ashug poetry, archaisms not only serve as a link between the past and the present, but also perform an important figurative function. Unlike ordinary colloquial speech, where archaisms can be incomprehensible or cause a feeling of obsolescence, in the context of poetry they act as elements bearing deep symbolic and metaphorical meanings.

In the Azerbaijani tradition, Ashug poetry makes extensive use of archaisms, which are often associated with everyday life, nature, mythology, and social structures characteristic of the past (Akhundov, 2007; Aliyev, 2019). Examples of archaisms found in the Azerbaijani Ashug language:

"Qaraçöp" (black piece of land, an obsolete word for poor land) – was used in poetry to describe the condition of poor peasants or rural poverty.

"Yelkan" (sail) – this word is not used in modern language, but in Ashug poetry it symbolizes the desire for freedom, the flight of thought.

"Eşk" (passion, love) is an old word for expressing a deep, often tragic feeling of love, which is often found in works about idealized love.

"Baz" (square, market) – in the old days, the word was used to refer to the main square or trading place in the village.

These archaisms create a special space where the language of poetry intersects with the historical reality of the past, through which the folk memory of former times is transmitted.

Archaisms also occupy an important place in Turkish Ashug poetry, often reflecting Anatolian or Ottoman forms of language that have now virtually disappeared from everyday communication. Examples of archaisms in Turkish:

"Meğerse" (if) is an old Turkish conjunctive that is rarely used in modern colloquial language, but in poetry adds poetry and a touch of sublimity.

"Süregör" (keep going) is an ancient form for addressing or ordering, which is no longer used in Turkish colloquial speech.

"Görkem" (greatness) is an ancient word for power, grandeur, which is often found in poetry in the context of images of idealized heroes.

"Yazgı" (fate) was used in the Ottoman language to denote fate, but in modern Turkish the word "kader" is more commonly used.

The use of these archaisms in Ashug poetry makes it more metaphorical and symbolic, and also strengthens the sense of connection with the past, with the great tradition. There are several reasons why archaisms continue to be used in the Ashug language:

Oral and traditional – Ashug poetry has always been transmitted orally, and it was through the oral tradition that the preservation of archaisms and dialectisms proved possible. In this context, archaisms serve as cultural heritage, preserving words that otherwise might have been forgotten.

Emotional saturation – archaisms are usually more expressive and meaningful than their modern counterparts. Inserting old words into the text allows you to achieve the desired emotional coloring, which is an important element of poetic speech. Romanticization and mythologization of the past –

archaisms are often used to create images related to myths, legends and the history of the people. For example, love in the works of the Ashugs is often depicted as tragic, sublime, which also requires an appropriate lexical apparatus.

Stylistic purpose – the use of archaisms helps to distinguish the poet's speech from ordinary language, giving the work a certain poetic distance and authenticity.

Archaisms in Ashug poetry are not random elements, their choice is always determined by a specific poetic task. These words, as a rule, have a symbolic meaning that enhances the images used in the work. For example, archaic words related to nature, such as “bulbül” (nightingale) or “gül” (rose), are often used in poetry to create images of beautiful and tragic love.

In addition, the use of archaisms contributes to the preservation and transmission of the cultural code of the people. This allows each generation to feel their unity with their ancestors, as well as to maintain a living connection with the traditions and origins of their culture.

Dialectisms are phonetic, morphological, or lexical elements typical of regional dialects. In the Ashug tradition, phonetic features of pronunciation of regional words and stable local expressions are often recorded.

A study comparing dialect words in the Ashug poetry of Goych shows how the linguistic environment of a particular region affects the formation of a poetic language (Kılıç, 2009).

Both traditions preserve the Turkic basis of the language of Ashug poetry, which contains ancient Turkic roots, dialectisms and archaisms due to the oral established poetic tradition (Başgöz, 1973).

In the Azerbaijani tradition, archaisms and dialectisms often reflect the influence of the regional dialects of the Caucasus, preserved in oral speech.

In Turkish poetry, dialectal elements more often reflect Anatolian dialects, as well as the historical development of the Turkic language in Anatolia, which is manifested in the selective use of ancient forms and local words.

An example of an analysis of a poem where archaism enhances the emotional mood, and regional words emphasize the local coloring of the traditional narrative.

The study of archaisms and dialectisms in Ashug poetry allows:

Reconstruct the historical layers of the Turkic language.

To understand the mechanisms of preservation of traditional speech in oral genres.

To analyze the influence of folk speech on the literary tradition as a whole.

Conclusion. Archaisms and dialectal elements in the language of Ashug poetry play a key role both in expressing artistic content and in conveying the cultural memory of the people. They emphasize the historical depth, regional identity and aesthetic value of folk art in both Azerbaijani and Turkish traditions. Such research strengthens the understanding not only of the language, but also of the mechanisms of the oral literary tradition of the Turkic peoples.

Lexical archaisms in Ashug poetry are not only lexical elements, but also the most important cultural markers. They serve as a link between different eras, reflecting the historical and cultural development of the people. Through these archaisms, Ashug poetry retains depth and authenticity, while creating a unique style that draws attention not only to the beauty of the language, but also to the importance of preserving cultural heritage.

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FUZZY LOGIC AND THE INTERACTION OF LEXICAL SYNONYMS IN NATURAL LANGUAGE

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Abstract. Fuzzy logic, while extensively applied in technical fields such as mathematics, engineering, and computer science, also provides profound insights into the structure and functioning of natural language. This article explores the intersection of fuzzy logic and lexical synonymy, focusing on how imprecise linguistic expressions reflect cognitive categorization and contextual variation. By examining the theoretical underpinnings laid out by Lotfi A. Zadeh and subsequent developments in fuzzy linguistic modeling, this study demonstrates the practical utility of fuzzy logic in modeling semantic gradation, contextual meaning shifts, and synonym selection in natural language. Applications in natural language processing (NLP), sentiment analysis, and artificial intelligence show how fuzzy logic enhances the interpretability of synonymous expressions and mirrors the way humans use language in real-world scenarios. The discussion also highlights the role of fuzzy sets in capturing lexical nuance, the benefits of degree-based semantic modeling, and the integration of fuzzy logic with modern computational tools, offering a comprehensive framework for more human-aligned language technologies.

Key words: Fuzzy logic, lexical synonymy, semantic gradation, natural language processing (NLP), cognitive categorization, fuzzy linguistic modeling, contextual meaning.

Introduction. Natural language is fundamentally different from formal languages: it is characterized by flexibility, vagueness, and context-dependence. One of the primary features contributing to this complexity is lexical synonymy – the phenomenon where multiple words have overlapping meanings but differ in emotional coloring, stylistic appropriateness, or intensity. This makes precise semantic modeling of natural language a challenge, especially for computational systems. Traditional logic, rooted in Aristotle's laws of identity and non-contradiction, operates on a binary axis: propositions are either true or false. However, such a rigid framework is ill-suited to capture the nuances of language where expressions often carry graded meanings. For instance, describing someone as "happy", "joyful", or "ecstatic" involves subtle shifts in semantic weight, yet classical logic treats them as discrete entities.

Fuzzy logic, introduced by Lotfi A. Zadeh (1965), revolutionized this view by allowing for degrees of truth, and by extension, degrees of meaning. Zadeh's later concept of "computing with words" (1996) made it possible to model linguistic expressions as mathematical entities with partial membership, opening the door to rich applications in both theoretical linguistics and artificial intelligence. This approach acknowledges that linguistic meaning is rarely absolute and instead emerges from interaction between context, cognition, and usage patterns. As a result, fuzzy logic offers a more realistic framework for capturing semantic fluidity. This article aims to expand our understanding of how fuzzy logic models the dynamic interplay of lexical synonyms in natural language, and to highlight its impact on computational linguistics, cognitive semantics, and machine learning.

Theoretical Foundations: Logic and Language

The rigidity of classical logic becomes most apparent when dealing with vague or context-sensitive expressions. Consider the adjective "tall" – its interpretation varies depending on whether we're discussing people, buildings, or plants. In binary logic, the question "Is John tall? " must return either true or false, regardless of context. Fuzzy logic, on the other hand, assigns a truth value between 0 and

1, enabling more nuanced judgments: perhaps John is 0.65 tall in the context of basketball players but 0.85 tall among his classmates (Zadeh, 1965).

This is particularly relevant to synonymy. Words such as “big”, “large”, and “huge” exist not in isolation, but as points within a semantic continuum. Classical semantic theory often failed to account for this. However, fuzzy logic naturally accommodates the notion that such words have overlapping meanings with graded intensities (Zadeh, 1996).

This leads us to the idea that synonymy is not a binary phenomenon (i.e., words are not either synonyms or not) but rather a matter of semantic proximity. Fuzzy logic provides the tools to model this proximity in quantifiable ways.

Furthermore, classical logic's reliance on dichotomous truth conditions overlooks the way meaning operates in human cognition. In natural language, meanings are frequently shaped by prototypes and prototypical contexts rather than strict definitions (Rosch, 1975). For example, while “cold”, “cool”, and “chilly” all describe lower temperatures, their usage is highly dependent on subjective perception and social norms. Fuzzy logic allows such expressions to be organized based on overlapping membership functions, reflecting degrees of similarity rather than categorical sameness.

Importantly, fuzzy logic bridges the gap between linguistic vagueness and computational formality. It enables a shift from truth-functional semantics to degree-based semantics, where statements like “The soup is hot” or “She is kind” are not judged in absolute terms but assessed on a continuum. This framework aligns more closely with everyday reasoning and provides a powerful foundation for natural language modeling (Lakoff, 1987).

Discussion.

Fuzzy Logic and Lexical Synonymy

The fuzzy treatment of synonyms implies that each lexical item can be viewed as a fuzzy set defined over a universe of discourse. For example, adjectives describing emotional states can be modeled as fuzzy sets on an affective scale. “Content” might have a membership value of 0.6 in the “positive feeling” category, while “joyful” might rate at 0.8, and “ecstatic” at 0.95. This allows computational systems to measure semantic distances between expressions and determine their degree of synonymy.

Moreover, fuzzy logic aligns closely with prototype theory, as introduced by Rosch (1975) and later applied to linguistics by Lakoff (1987). According to this theory, categories have central members (prototypes) and peripheral members. In the synonym cluster of “happy”, the prototype might be “happy” itself, while “glad”, “content”, and “joyful” occupy varying positions along the semantic periphery. Fuzzy logic enables this distribution to be formally represented.

What makes fuzzy logic particularly useful is its ability to integrate both semantic intensity and contextual flexibility into a single formal model. For instance, the word “strong” can take on different fuzzy membership values depending on whether it's applied to a person’s personality (e.g., “strong-minded”) or to a physical object (e.g., “strong bridge”). These contextual shifts in meaning are naturally modeled by fuzzy systems, which allow lexical items to participate in multiple overlapping categories with varying degrees of activation.

In computational linguistics, this approach has practical implications. Fuzzy semantic modeling supports the development of sentiment analysis systems, paraphrase detection, and synonym expansion in information retrieval. For example, if a user searches for “powerful”, a fuzzy model could suggest “mighty”, “strong”, or “robust” as results, each weighted according to its degree of synonymy. This avoids rigid keyword matching and leads to more human-like understanding in artificial intelligence systems (Yager & Zadeh, 1990).

Thus, fuzzy logic not only reflects cognitive intuitions about synonymy but also provides the mathematical and algorithmic infrastructure for modeling meaning in intelligent systems.

Contextual Variation and Pragmatics

Words do not exist in a vacuum; their meanings shift based on context, intent, and discourse structure. For instance, the phrase "He's satisfied" can imply contentment in a professional context but mediocrity in a personal context. Here, pragmatics plays a crucial role in interpretation.

Fuzzy logic can incorporate contextual weights into membership functions. For example, in a performance review, the term "good" might receive a lower score (e.g., 0.6), while in a casual setting, it might rate higher (0.8). This approach captures the dynamic nature of synonym interpretation, making fuzzy models more adaptable than fixed lexicons.

Furthermore, hedges such as "very", "quite", or "somewhat" act as fuzzy modifiers, shifting the membership values of base terms. In fuzzy systems, these can be modeled mathematically using hedge functions, allowing more precise interpretation of nuanced expressions.

Lexical synonyms can be defined as words that share similar or nearly identical meanings while differing in stylistic, emotional, or contextual nuances. Examples such as *happy*, *satisfied*, and *content*, or *large*, *huge*, and *massive*, illustrate how meaning is distributed across a semantic continuum rather than fixed categories. In classical logic, such variations are difficult to represent because propositions are either true or false. A person is either "happy" or "not happy". leaving no room for intermediate states.

Fuzzy logic addresses this limitation by introducing degrees of membership. In a fuzzy linguistic framework, synonymous expressions can be represented as overlapping fuzzy sets, each associated with a membership function that reflects its semantic intensity. For instance, the adjective *happy* may have a membership value of 0.7, *very happy* 0.85, and *ecstatic* 0.95, depending on context. This graded representation aligns more closely with human cognitive processes and linguistic intuition (Zadeh, 1965).

Moreover, fuzzy logic allows the modeling of semantic fluidity across different registers, contexts, and speaker intentions. Words like *calm*, *relaxed*, and *peaceful* may seem interchangeable, but their use varies subtly in discourse depending on collocation and tone. These distinctions, traditionally difficult to formalize, can now be quantified using fuzzy similarity measures and context-sensitive membership functions (Baccianella, Esuli, & Sebastiani, 2010). This approach is particularly useful in computational applications such as sentiment analysis and automatic paraphrasing, where the detection of nuanced synonymy significantly enhances performance.

Lexical Synonyms and Fuzzy Semantics

Lexical synonyms can be defined as words that share similar or nearly identical meanings while differing in stylistic, emotional, or contextual nuances. Examples such as *happy*, *satisfied*, and *content*, or *large*, *huge*, and *massive*, illustrate how meaning is distributed across a semantic continuum rather than fixed categories. In classical logic, such variations are difficult to represent because propositions are either true or false. A person is either "happy" or "not happy". leaving no room for intermediate states.

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Additionally, fuzzy logic allows for context-sensitive semantic modeling, in which the strength or salience of a synonym depends not only on its denotative meaning but also on pragmatic factors such as tone, collocation, and discourse structure. For example, in the sentence *"She was content after the meeting,"* the term *content* may convey a neutral or slightly positive emotion; however, in contrast,

happy would suggest a stronger affective state. Systems that rely on strict binary matching would fail to detect these nuances, whereas fuzzy-based models can interpret them through graded similarity.

In computational linguistics, this has proven especially valuable in tasks such as sentiment analysis and semantic similarity measurement, where recognizing subtle degrees of emotional or descriptive equivalence between terms improves performance (Cambria et al., 2020). Resources like SentiWordNet and contextual embeddings such as BERT can be enhanced with fuzzy techniques to model the intensity and overlap of synonym meanings more effectively.

Applications in Natural Language Processing

In contemporary NLP applications, the ability to recognize and interpret synonymous expressions is essential. Humans naturally employ different words to express the same idea, and computational systems must be able to handle this variability. Fuzzy logic enables NLP systems to treat synonymous adjectives such as *happy*, *joyful*, and *cheerful* as semantically related terms with different degrees of positivity.

This approach is particularly effective in sentiment analysis, where emotional expressions are rarely binary. Instead of classifying sentiment as strictly positive or negative, fuzzy sentiment analysis assigns degrees of positivity or negativity to lexical items. For example, *good* may be assigned a value of 0.7, *excellent* 0.9, and *acceptable* 0.5, allowing for more nuanced interpretations of text.

Furthermore, fuzzy logic can be integrated with lexical semantic resources such as WordNet and vector-based word embeddings (e.g., GloVe or Word2Vec). Similarity scores derived from these resources can be incorporated into fuzzy membership functions, enabling systems to measure semantic closeness among synonyms and form fuzzy semantic clusters. This interdisciplinary approach is often referred to as fuzzy linguistic modeling or fuzzy lexical semantics (Yager & Zadeh, 1990).

Recent advancements in contextual embeddings, such as BERT, further enhance this synergy by capturing the context-dependent meanings of synonyms. By combining fuzzy logic with these dynamic representations, NLP systems can better distinguish between subtle contextual usages–for example, the word *cold* in "cold weather" vs. "a cold attitude". These contextual embeddings can be used to dynamically adjust fuzzy membership values based on surrounding text (Devlin et al., 2019).

In addition, fuzzy models support question answering systems, chatbots, and machine translation by providing flexibility in matching user input to semantically related alternatives. For instance, when a user says "I'm feeling down", a fuzzy-aware system can interpret it as semantically related to "sad" or "unhappy", even if the exact word match is missing. This leads to more human-like, adaptive NLP behavior and significantly improves user interaction quality in AI applications.

Cognitive and Linguistic Perspectives

From a cognitive linguistics perspective, fuzzy categorization aligns closely with human conceptualization. Lakoff (1987) argues that linguistic categories are inherently fuzzy and prototype-based, rather than sharply defined. This view supports the idea that synonymy and semantic overlap are natural features of human language. For instance, in the category of "furniture", a "chair" may be a more prototypical member than a "stool" or "beanbag", even though all belong to the same category. Similarly, in synonym clusters like *happy*, *content*, *joyful*, and *delighted*, there exists a gradation of emotional intensity and prototypicality rather than binary equivalence.

Ullmann (1962) also emphasizes the contextual variability of meaning, noting that words acquire different shades of interpretation depending on social, emotional, and syntactic context. This further supports the idea that meaning is not fixed but fluid and context-sensitive, an idea that fuzzy logic elegantly captures through graded membership and semantic proximity.

Russian cognitive linguistic research also highlights the fuzzy nature of semantic interpretation. Ostrovski (1999) explains how categorization and conceptualization involve the gradual organization of knowledge rather than strict classification. Words are not simply matched to definitions but are activated through conceptual schemas shaped by usage, culture, and cognitive salience.

Furthermore, recent developments in frame semantics and embodied cognition reinforce the argument that meaning is constructed through dynamic mental models and perceptual experience rather than static definitions (Barsalou, 2008). These theories mirror the fuzzy logic approach, where categories and synonyms are understood not as fixed entities but as flexible constructs modulated by perception, context, and prototype structure.

Taken together, these perspectives strongly reinforce the argument that fuzzy logic offers not only a computational tool but also a cognitively realistic framework for modeling synonymy, vagueness, and semantic gradation in natural language understanding.

Conclusion. The analysis presented in this article demonstrates that fuzzy logic offers a powerful and linguistically motivated framework for understanding and modeling lexical synonyms in natural language. By allowing degrees of membership and semantic overlap, fuzzy logic overcomes the limitations of classical binary logic and reflects the inherently imprecise nature of human language.

The foundational work of Lotfi A. Zadeh shows that fuzzy logic was never purely mathematical; rather, it emerged from an attempt to formalize the way humans reason and communicate using vague linguistic concepts. Subsequent developments in computing with words, fuzzy knowledge representation, and fuzzy linguistic modeling have further strengthened the connection between fuzzy logic and linguistics.

In practical terms, the integration of fuzzy logic into NLP, sentiment analysis, and semantic modeling enables computational systems to interpret synonymous expressions more accurately and humanlike. As language technologies continue to evolve, the combined application of fuzzy logic and linguistic theory promises significant contributions to the development of intelligent systems capable of nuanced language understanding.

Moreover, fuzzy approaches can be extended beyond synonymy to model polysemy, metaphor, and idiomatic variation–areas where classical semantics often fails. Future research may focus on integrating fuzzy logic with neural language models, enabling even deeper alignment between computational meaning representation and human cognitive patterns of language use.

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EASTERN MYTHOLOGY AND PHILOSOPHICAL SUBSTRATES IN THE MODERN AMERICAN NOVEL

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Abstract. At the end of the 20th century and the first quarter of the 21st century, interest in Eastern mythology and philosophy in American literature is directly related to the strengthening of globalization, postcolonial discourse, and multicultural ideology. In the modern American novel, the East is no longer presented as an exotic or "other" culture, but as an alternative system of thought to the ontological and moral crises created by Western rationalism. In this context, Eastern mythological and philosophical models play an active role in the semantic and structural layers of the literary text. The article examines the forms of artistic realization of Eastern mythology and philosophical sublayers in the modern American novel based on the works of authors such as Don DeLillo, Thomas Pynchon, Jhumpa Lahiri, and Khaled Hosseini. The methods of mythopoetic analysis, postcolonial approach, and intercultural hermeneutics were used in the research. As a result of the research, it is determined that Eastern philosophy plays an important role in the formation of the cyclical model of time, the artistic interpretation of the problem of identity, and the ethical-humanistic discourse in the American novel. The article shows that Eastern mythology and philosophical underpinnings are not decorative elements in the modern American novel, but rather a structuring principle that gives philosophical depth to postmodern aesthetics.

Key words: Eastern mythology, Eastern philosophy, modern American novel, postmodernism, orientalism, diasporic literature, identity problem, mythopoetics, intercultural dialogue.

Introduction. The end of the 20th century and the first quarter of the 21st century are characterized by the intensification of intercultural relations in the world literary process, the repositioning of national literatures in the global context, and the transformation of aesthetic paradigms. These processes are especially clearly observed in American literature. Globalization, migration, postcolonial discourse, and the strengthening of multicultural ideology have led to serious changes in the subject matter, problematics, and poetics of the American novel. One of the most notable directions of these changes is the growing interest in Eastern culture, mythology, and philosophical heritage.

If at the beginning of the 20th century, the East was presented in American literature more as an exotic, romantic, or stereotypical image, then from the end of the 20th century this approach has fundamentally changed. In the modern American novel, the East no longer acts as an "other" culture, but as an alternative system of thought that allows us to understand the moral, ontological, and epistemological crises of Western civilization. In this regard, Eastern mythology and philosophy have begun to play an active role in the semantic and structural layers of the American novel.

Eastern mythological systems — Hinduism, Buddhism, Taoism, Islam, and Sufism — understand fundamental problems such as existence, time, death, memory, and identity on a different ontological level. In these systems, time is not linear, but cyclical; and man is not a separate subject from the universe, but is perceived as an integral part of it (Eliade, 1954). It is precisely these features that, in harmony with the postmodern way of thinking, create broad artistic possibilities in the modern American novel.

Postmodernism expresses the bankruptcy of "grand narratives" in Western culture, the undermining of the concept of stable truth, and the fragmentation of meaning. This ideological crisis actualizes the appeal to non-dualistic, paradoxical, and meditative models of thought of Eastern philosophy. As a result, Eastern philosophy participates in the American novel not only at the level of the subject, but also in the formation of the narrative structure.

This process is of particular scientific interest in the context of Edward Said's concept of orientalism. Unlike the classical orientalism criticized by Said, in the modern American novel, Eastern mythology acts not as an object of ideological dominance, but as a partner in philosophical dialogue (Said, 1978). This indicates that East-West relations in American literature have entered a new stage.

The purpose of the presented article is to investigate in what forms, with what aesthetic and ideological functions, Eastern mythology and philosophical substrata are realized in the modern American novel. During the research, mythopoetic, postcolonial and intercultural hermeneutic analysis methods were used based on the works of authors such as Don DeLillo, Thomas Pynchon, Chumpa Lahiri and Khaled Hosseini. The article aims to reveal the structuring and conceptual role of Eastern mythology in the American novel.

Discussion.

The ontological model of Eastern mythology and its semantic function in the modern American novel

Mythology is not only the primary form of thought of culture, but also one of the main philosophical mechanisms regulating man's relationship with existence. According to Mircea Eliade, myth is not only an explanation of the past, but also a living structure that gives meaning to man's existence in the world (Eliade, 1954). In Eastern mythology, this structure is built on the ideas of cosmic harmony, periodic time, reincarnation, and the unity of man with the universe. In the Western mythological model, man is presented more as a central subject and time has a linear character.

At the end of the 20th century and the beginning of the 21st century, the modern American novel creates a space of intense dialogue between these two models. Eastern mythology is not only exotic material for American novelists, but also becomes an alternative system of thought to express the moral and ontological crisis caused by Western rationalism. Especially in postmodern novels, the mythological structure disrupts the linear development of the plot, presenting events in a cyclical and fragmentary form.

In Thomas Pynchon's novel Gravity's Rainbow, the instability of the concept of time and the repetitive structure of events recall the idea of cosmic cycles in Eastern mythology. The narrative space of the novel is chaotic and non-centered; this is built parallel to the process of "endless creation and destruction" present in Hindu-Buddhist cosmogony (Pynchon, 1973). Here, the mythological model acts as a means of deconstructing the myth of technological civilization. This approach is of particular importance in the context of Edward Said's theory of Orientalism. As Said noted, the stereotypical presentation of the East by the West has long overshadowed its philosophical potential (Said, 1978). In the modern American novel, however, Eastern mythology plays the role of an active semantic source, not a passive object.

Eastern Philosophy in the Postmodern American Novel: Narrative Embodiment of Buddhism and Taoism

The postmodern American novel is characterized by epistemological uncertainty, the fluidity of meaning, and the collapse of grand ideological narratives. These features organically harmonize with the non-dualistic and relative worldview of Eastern philosophy. In Buddhist philosophy, existence is expressed in the concept of "emptiness" (śūnyatā); that is, no essence is permanent, everything is transient.

In Don DeLillo's novel "Falling Man", this philosophical approach is clearly visible in the psychological state of the heroes. After the events of September 11, the characters realize their existence in emptiness and silence. The dominance of silence, pauses, and uncertainty throughout the novel corresponds to the Eastern meditative model of thought (DeLillo, 2007).

DeLillo's heroes abandon explanatory models based on Western rationalism and turn to inward observation. This is the artistic equivalent of the idea of "approaching truth by losing oneself"

in Buddhist thought. The Taoist "wu wei" – the principle of action without force – is manifested in the refusal of the plot to develop purposefully. Events are left to their own devices, and the hero does not resist this flow.

Thus, Eastern philosophy is present in the postmodern American novel not only as a theme, but also as a form of narrative thought and determines the structure of the novel.

Eastern mythology and identity discourse in the diasporic novel

One of the areas where Eastern mythology is most intensely manifested in the modern American novel is diasporic literature. Hybrid identities formed as a result of migration maintain a connection with their historical roots through mythological memory. Here, myth acts not as nostalgia for the past, but as a mechanism for reconstructing identity.

Chumpa Lahiri's novel "The Namesake" is significant in this respect. The name problem at the center of the novel is reminiscent of the "name–fate" relationship in Hindu mythological and philosophical thought. According to Hinduism, the name is directly related to a person's karma and determines his fate. The fact that the hero's name belongs to Western culture symbolizes his internal fragmentation (Lahiri, 2003).

Although the idea of reincarnation is not directly expressed throughout the novel, the identity crises that recur at the stages of the hero's life remind us of a cyclical time model. Eastern mythology here acts not as an ethnic attribute, but as a universal humanist code and raises individual experience to a universal level.

The ethical and philosophical role of Islam and Sufism in the modern American novel

In the modern American novel of the 21st century, Islamic culture and Sufism philosophy have acquired a new aesthetic and ideological meaning, especially against the background of global political processes, post-9/11 discourse and intercultural tension. If at the beginning of the 20th century the subject of Islam in American literature was limited to either marginal or stereotypical images, at the modern stage this approach has been significantly transformed. Islam and Sufism are no longer presented as an ideological "threat", but as a system of ethical, spiritual and philosophical values.

Sufism, as a mystical branch of Islamic thought, is built on the ideas of inner perfection of a person, education of the soul, love and spiritual freedom. This philosophical model creates alternative interpretation possibilities for the problems of spiritual emptiness, alienation and ethical crisis observed in Western society in the modern American novel. The concepts of "inner truth", overcoming of the "self" and divine love, which occupy a central place in Sufism, organically resonate with the existential searches of the postmodern novel (Chittick, 1989).

In this context, Khaled Hosseini's novel "The Kite Runner" is of particular importance. Although the novel is set against the backdrop of political and social problems, its deep semantic layer contains an ethical-philosophical model specific to Sufism. The inner development of the main character Amir is reminiscent of the stages of the classical Sufi journey: realization of sin, remorse, repentance, and spiritual purification. Amir's confrontation with his past mistakes and his attempt to correct them corresponds to the stage of "nafs-i lavwama" in Sufism (Hosseini, 2003).

The ethical burden of the novel is based on the concept of collective responsibility and moral duty, in contrast to Western individualism. This acts as an artistic expression of the categories of "trust" and "conscience" that occupy a central place in Islamic philosophy. Amir's salvation is presented as a moral act, not a legal or social one, which brings the ethical model of Sufism to the fore.

In post-9/11 American novels, the philosophy of Islam and Sufism also performs the function of deconstructing stereotypes. As Peter Morey has noted, in the modern English-language novel, Islam is increasingly presented as an "ethical subject", creating a form of literary resistance to Islamophobic discourses in Western culture (Morey, 2011). In this context, the American novel, moving away from ideological rhetoric, constructs a humanistic and empathetic narrative.

The motifs of “the path”, “light”, “silence”, and “love”, which are among the main symbols of Sufism, have a metaphysical meaning in the modern American novel. These symbols express the inner transformation of the hero rather than the external development of events. The rational conflict model dominant in the Western novel tradition is replaced here by meditative and reflective structures. Thus, the philosophy of Sufism plays a structuring role in the poetics of the novel.

One of the important points is that Islam and Sufism in the modern American novel are not limited to the work of authors of Eastern origin. Sufi ethics and metaphysical thought are also used in the works of non-Muslim authors as a universal model expressing the spiritual quest of the individual. This shows that Islamic philosophy has emerged from the national-religious framework and has become a global humanistic value.

Consequently, the philosophy of Islam and Sufism plays an important role in the formation of the ethical-philosophical discourse in the modern American novel. This discourse criticizes the moral crises existing in Western culture, brings to the fore the ideas of individual responsibility and inner perfection, and moves the East-West confrontation to the level of dialogue. Thus, Sufism acts not only as a thematic element in the American novel, but also as a model of artistic-philosophical thought.

The poetic and structuring function of Eastern mythology

In the modern American novel, Eastern mythology acts not only as a theme or decorative element, but also as a poetic and structuring principle. In the postmodern aesthetic context, the traditional linear plot model is disrupted, events have a cyclical, fragmentary and symbolic structure. Elements of Eastern mythology play a decisive role in the creation of this type of structure.

Periodic time and fragmentary narrative

In Hindu and Buddhist mythology, time is not linear, but cyclical and repetitive. This model transforms the structure of the plot in the American postmodern novel. In Thomas Pynchon's Gravity's Rainbow, events are presented from different perspectives, the linearity of time is disrupted, and the actions of the heroes are associated with constantly recurring motifs (Pynchon, 1973). This cyclical structure is the artistic equivalent of the Hindu idea of reincarnation and Buddhist karma. Through mythological codes, the author shows the reader that time is relative, that human experience is cyclical and transformative.

In Don DeLillo's novel Falling Man, the cyclical motifs in the description of the events of September 11 – silence, pauses, the inner monologues of the heroes – are paralleled by the meditative experiences of Sufism and Buddhism (DeLillo, 2007). Here, Eastern mythology and philosophy act not only as a thematic, but also as a structuring element, creating a rhythmic and poetic flow in the description of events.

Symbolism and poetic functions

In Eastern mythology, symbols such as water, light, road, mountain, silence, love express the inner and cosmic harmony of man (Campbell, 1949). In the modern American novel, these symbols strengthen the poetic function and form the narrative structure.

For example, in Khaled Hosseini's The Kite Runner, the pens and winged kites flown as children symbolize the cyclical repetition of childhood memories, remorse, and spiritual purification (Hosseini, 2003). These symbolic elements disrupt the linear plot line, create metaphysical connections between events, and provide a poetic impetus for the reader to feel an internal transformation.

In Jhumpa Lahiri's novel The Namesake, names and ritual symbols from Hindu mythology structure the protagonist's identity crisis, his relationship with his family and past (Lahiri, 2003). Here, mythological elements play both thematic and structural roles, acting as a bridge connecting fragmentary social and psychological events.

Formation of narrative and metaphysical harmony

Eastern mythology is also a key tool in the formation of the metaphysical layer of the novel. Periodic time, recurring symbols, and mystical experience connect the reader not only with the

sequence of events, but also with the inner world of the heroes. This feature allows the structure to be fragmentary but semantically harmonious in postmodern aesthetics. Thus, Eastern mythology plays the role of a poetic model of narrative harmony in the American novel.

In the works of Thomas Pynchon and Don DeLillo, the cyclical nature of time and the rhythmic repetition of symbolic motifs create in the reader a sense of both aesthetic and philosophical meaning. This approach clearly demonstrates the structuring and artistic-aesthetic function of Eastern mythology.

Intertextual and intercultural function of Eastern mythology

Mythology also creates intertextual connections. Eastern mythology resonates with postcolonial and diasporic discourses in Western literature, allowing for intercultural dialogue. For example, the symbols of Sufism and Taoism are used not only in the Eastern context, but also to solve Western ethical and existential problems. This strengthens the global and multicultural character of the American novel.

Eastern mythology acts as an integral part of the poetic-aesthetic and structuring functions in the modern American novel. It is not only a decorative framework for events and themes, but also:

- forms a narrative structure through periodic time and recurring motifs,
- creates a poetic layer through symbolic language and metaphorical motifs,
- connects the reader with the inner world of the characters,
- strengthens intertextual and intercultural dialogue.

Thus, Eastern mythology acts as a principle that provides philosophical depth and a structure of poetic harmony to the postmodern aesthetic in the American novel.

Conclusion. The study shows that in the modern American novel, Eastern mythology and philosophical substrata are not accidental or decorative elements, but important components that form the ontological and semantic foundations of the literary text. Eastern mythological and philosophical systems are presented in the American novel as an alternative model of thought to the moral and epistemological crises of Western culture.

The study proves that Eastern mythology performs several main functions in the American novel. First of all, it deconstructs the linear plot model by relativizing the concept of time and space. Elements of Eastern thought such as periodic time, repetition, and metaphysical silence create a structure consistent with the poetics of the postmodern novel. This is clearly observed in the works of Thomas Pynchon and Don DeLillo.

The second important function is related to the artistic interpretation of the problem of identity. In the work of diaspora writers, Eastern mythology acts as a mechanism that unites individual and collective memory. In the novels of Chumpa Lahiri, Hindu mythological thought plays the role of a semantic code serving to restore a fragmented identity. Here, myth is presented not as an ethnic attribute, but as a universal humanistic value.

The third aspect is related to the creation of an ethical and humanistic discourse in the contemporary American novel by the philosophy of Islam and Sufism. In Khaled Hosseini's works, Sufism is presented as a model of spiritual perfection and internal transformation, and this approach creates new interpretative possibilities in the Western reader's attitude towards Eastern culture. Thus, Eastern philosophy becomes a means of spiritual dialogue rather than an object of ideological confrontation.

Consequently, Eastern mythology and philosophical substrata give philosophical depth to postmodern aesthetics in the contemporary American novel, and a conceptual basis for intercultural dialogue. This strengthens the position of American literature in the global literary process and turns it into a space of not only national, but also universal thought.

The conducted research also opens up broad prospects for future research. The study of Eastern mythology in the American novel in the context of more specific motifs, individual philosophical schools, and different ethnic literatures can be assessed as a relevant and productive direction for contemporary literary criticism.

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APHORISMS IN THE AZERBAIJANI LANGUAGE, THEIR LINGUISTIC STRUCTURAL ANALYSIS AND FORM OF USE IN DICTIONARIES

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Abstract. The article presented for discussion has a certain scholarly interest. The author summarizes facts discovered by modern linguists and, in the process, presents his perspective on the issue under study. Within the scope of this compact work, the key structural and syntactic features and characteristics of Azerbaijani aphorisms are nevertheless detailed. They are presented in their diversity, more precisely, as part of both narrative and interrogative sentences, including rhetorical ones. It is emphasized that they could have been created by an author (most often) or (less often) by a group of people. In any case, they always and universally express folk wisdom and therefore carry philosophical or cultural overtones.

In terms of stylistic possibilities, aphorisms are one of the most effective forms of expression in language. Aphorisms can be used in both artistic and formal contexts and are often chosen to influence people's emotional worlds. The stylistic features of aphorisms determine how the ideas they express are conveyed and how these ideas are perceived by the interlocutor. The article also analyzes in detail these stylistic possibilities of aphorisms.

Key words: aphorism, linguistic structure, Azerbaijani language, lexicography, phraseology.

Introduction. Aphorisms are linguistic units that expand the expressive potential of language and express a profound and generalized thought in a concise form. Aphorisms are widely used in fiction, journalistic, and scientific texts. In Azerbaijani linguistics, aphorisms have been studied primarily in the context of phraseology, stylistics, and lexicology (Aforizmlər: seçilmişlərdən seçilmişlər, 2012). Currently, a comprehensive study of the linguistic structural features of aphorisms and their presentation in dictionaries is a pressing scientific issue.

An aphorism is characterized as a linguistic unit expressing a brief, laconic, and logically complete thought. It serves to present a specific event, life experience, or philosophical conclusion in a generalized form. Aphorisms are usually authorial and reflect an individual worldview and intellectual position. From this perspective, the aphorism is assessed as a linguistic fact and a cultural-philosophical textual unit.

The phraseology of the modern Azerbaijani literary language possesses extremely rich and varied stylistic possibilities. Set phrases with a distinct national flavor, profound proverbs, wise sayings, poignant aphorisms, and beautiful phrases constitute the extremely rich artistic and exemplary fund of the Azerbaijani language (Qurbanov, 2019).

Although aphorisms in Azerbaijani are brief in expressiveness, they are quite meaningful in meaning. They are often built on figurative meaning and give the reader the opportunity to reflect deeply. The main purpose of aphorisms is to draw a general and universal conclusion without the need for lengthy explanations. This characteristic makes them a means of expression frequently used in journalism, art, and science.

The main goal of this article is to determine the place and functionality of aphorisms in the lexical system of the Azerbaijani language.

Results and Discussion. The term "aphorism" is used to denote a judgment or idea that is brief, concise, and philosophical in nature. In Azerbaijani, aphorisms are primarily authorial expressions reflecting the social and moral realities of a particular period (Azərbaycan dilinin izahlı lüğəti, 2006, p. 51). Their main characteristics are as follows:

– broad meaning;
– compact form of expression;
– generalizing and didactic nature;
– emotionally expressive tone.

These characteristics serve as the main criteria distinguishing aphorisms from proverbs and sayings (Aforizmlər və müdrik nəsihətlər, 1991).

Syntactically, aphorisms consist of simple and repetitive syntactic structures. However, they are quite complex in content and meaning.

Simple sentences: the idea or meaning is expressed briefly and concisely. For example: "Zaman hər şeyi həll edir"[1]. Despite its simple syntactic structure, this sentence contains multiple layers of meaning.

Compound Sentences: Aphorisms sometimes use compound sentences, especially in the affirmative, conditional, and final forms. For example: "Əgər insan öz yolunu taparsa, heç bir şey onu saxlaya bilməz".

In Azerbaijani, aphorisms are generally formed within a simple syntactic structure. Although declarative sentences predominate, rhetorical questions and conditional sentences are also common. For example, sentences like "İnsan özünü dərk etmədən dünyanı anlaya bilməz" are syntactically simple but semantically multilayered (Hacıyev, 1976).

The syntactic structure of aphorisms enhances their depth of meaning and expressive power. However, most often, this structure is contained within succinct and concise remarks. The explanation is simple: the author (and in some cases, the representatives of a collective creative team) needed to convey the deepest possible meaning in a particular aphorism. Therefore, the sentence itself is distinguished by relative simplicity of expression and clarity of style.

If this is indeed the case, then we have compelling reasons to argue that the syntactic structure of Azerbaijani aphorisms, firstly, is deeply meaningful, and secondly, due to its poignancy and brevity, has its own distinctive features. The creator of aphorisms aims, above all, to skillfully utilize the rich internal potential of the grammatical, logical, and structural capabilities and characteristics of the language. The harmonious combination of these linguistic features inherently enhances the expressiveness of aphorisms. Consequently, their dynamics increase in mathematical progression. And this, in turn, is a powerful stimulant of the forms of expression and the syntactic diversity of forms in the language – in our case, in modern Azerbaijani.

This evolving dynamic is such that, according to their syntactic norms, aphorisms can consist of both complex and simple (common, uncommon, or complex) sentences. In any case, they succinctly express the author's central idea. Let us give one typical example: "Zaman hər şeyi dəyişdirir". Let us examine the aphorism from the perspective of its internal content. In a simple and concise form, it expresses the main idea. In this case, it is monosyllabic. But other variants are also possible, where the syntactic structure allows for the expression of more complex authorial thoughts. For example:

"İnsan nə qədər özünü tanısa, başqalarını da o qədər yaxşı anlayarr". What characterizes the syntactic structure of the aphorism cited? In our opinion, the profound idea is manifested here by two consecutive subordinate clauses.

As noted at the very beginning of our article, they naturally strive to convey a complex idea in this way. Because aphorisms have two sides of the coin – explicit and implicit meanings – they symptomatically stimulate the reader.

For example: "İnsan bir dəfə dünyaya gəlir". Syntactically, this is a simple, common sentence. However, it's worth noting that the phrase/expression "dünyaya gəlir" is clearly associated with such a significant event as a person's birth.

[1] Here and below are aphorisms used mainly in colloquial and everyday vocabulary, as well as in various sources.

Modern linguists have noted that the majority of Azerbaijani aphorisms are declarative sentences. However, it turns out that interrogative ones also occur. At first glance, this might seem like a personal expression of the author's will. However, if they contain a question, it carries a charge of philosophical force. As a rule, such questions force one to ponder the correct answer. In our opinion, the fact that they are less common quantitatively than declarative sentences only further demonstrates their mobility.

Let us give an example: "İnsan nə zaman başqasının dərdini anlamağa başlayar?". It is easy to see that this is a question, and it's typical that the reader must answer it themselves. Moreover, the question can also be rhetorical, in which case it demands even greater independence from the reader.

This is confirmed by the following example: "Nə üçün güvənmək çətindir, amma inamsızlıq çox asandır?"

The semantics of aphorisms are typically figurative. Universal values, ethical norms, and philosophical conclusions are concentrated within a single expression. This ensures their universality across time and space (Aforizmlər: seçilmişlərdən seçilmişlər, 2012, p. 118).

Aphorisms are semantically multilayered. That is, a single sentence contains both concrete and figurative meanings. This feature enhances their power and lends the text multiple interpretations. Aphorisms rely largely on figurative meaning, and sometimes their explicit meaning can only be discerned by the reader or listener in different contexts.

Aphorisms often possess polysemy (multiple meanings). The presence of multiple meanings in a single sentence provides the reader with a variety of interpretations. This multiplicity deepens the meaning of the aphorism and leads to its being understood differently in different situations and contexts.

For example: "Gözlər insanın ruhunu göstərir".

The above sentence should be considered in two ways. A) The medical purpose, that is, the eye as an organ of vision; B) Not the physical, but the figurative meaning, as an aphoristic reflection of the individual's psychological world, primarily its emotional one. Moreover, it seems to us difficult to distinguish the stylistic dominant in this aphorism – the physical or the emotive concept. This example alone clearly demonstrates the polysemy of Azerbaijani aphorisms, which, upon closer examination, undoubtedly convey a broader idea than might appear at first glance.

The figurative and metaphorical meaning of Azerbaijani aphorisms is a panacea for accurately deciphering their meanings, both literal and figurative. But metaphorization, of course, enriches them, imbuing them with a semantic meaning that makes readers pause and reflect. Moreover, taking into account the irrefutable fact of a fairly solid baggage of lexical metaphors in the modern Azerbaijani language, both professional scientists and ordinary readers have the opportunity to compare and contrast different objects with a particular event or concept.

Zaman bir çay kimi axır – If the beginning of the aphorism nominatively denotes its time, the second part of the sentence is a lexical metaphor, compared to a river. If we draw a line between the two parts of the phrase, it becomes clear: the main idea is contained in the nature of time itself. Thus, the entire sentence acquires a philosophical meaning. After all, a river is a prototype of fluidity, the uneven movement of waters, and their instability.

It is significant that the syntactic structure of national aphorisms often contains a certain element of generalization. The conclusions, as a rule, are also varied and diverse. In particular, they are quite capable of reflecting real events, current situations, and human behavior. This triad clearly testifies to the acquisition of positive life experience, on the one hand, and philosophical reflection, on the other. Thus, the overall meaning of the aphorisms expands.

"Həyat bir yolculuqdur, amma nə qədər uzun olursa olsun, sona çatır".

If the previous aphorism associatively bridged the gap between time and the river, here the chronotope of time illustrates a change in life, recording an experience that is clear to everyone. Thus, aphorisms are born in the form of statements that literally have enduring meaning. In fact, this is proof of the uniqueness and universality of time as a global philosophical concept, enshrined in linguistics.

Azerbaijani aphorisms are imbued with elements of irony, subtle humor, and even paradox. The tangle of contradictory thoughts seems to provoke readers to serious reflection with corresponding consequences. Irony and humor only enhance the allegory.

"Həyat ən gözəl şəkildə başladığı yerdə sona çatır".

In this case, the sentence is not so much ironic as it expresses a paradox. It lies in the simultaneous contrast between two directly antonymous (beginning and end) phases of life. This motivates the modern reader to more deeply appreciate the frailty of existence, the fleeting nature of life.

From all of the above, one can draw the preliminary conclusion that brevity and simplicity are outwardly conventional attributes that actually deepen their moral and ethical meaning. So the situation is essentially analogous to paremias, where clarity of style, coupled with inner content, enriches the overall meaning of aphorisms with multiple layers of meaning.

Let us give an example:

"Sözlər bəzən daha çox təsir edir".

This is a simple sentence, but if we break it down into three components at a conditional associative level, we believe each of these internal elements helps us better understand not only human behavior but also the fluidity of the Azerbaijani language and its communication factors.

It is also true that some aphorisms can have a positive impact on a person's emotional state. True, this influence is indirect; however, its figurative and metaphorical language more accurately captures the essence of the aphorism, making it vivid, memorable, and, since it influences emotions, somewhat touching.

A typical example:

"Ümid heç vaxt itirilməz"

Unlike the one above, this sentence is simple, yet saturated with various emotions. This is expressed in a bright hope for a better future. Here, strong and noble feelings prevail and should, in theory, evoke a corresponding response in the reader.

By analyzing Azerbaijani aphorisms, we came to some interesting conclusions. In particular, it turns out that when compared, the meaning of certain ideas coincides. In any case, the central links of the aphorisms are identical or very similar to one another. For example, a conflict between ideas, situations, or events flares up, and this naturally evokes divergent associations in the reader. Thus, the meaning of the aphorisms expands.

"Başqalarının səhvlərini bağışlamaq çətindir, amma öz səhvlərini anlamaq daha da çətindir".

This compound sentence contains two situations that are polar opposites in meaning. On the one hand, they are diametrically opposed, yet on the other, they are closely related. Contradictions and the possibility of unification, figuratively speaking, in a single person based on a common idea – this is the decisive understanding of the aphorism.

The palette of aphorisms in the Azerbaijani language is very rich. Above all, they are characterized by a wide arsenal of ideological and artistic devices. Among them, the presence of lexical metaphors, antonyms, epithets, and parallelism is noteworthy. Clearly, they "organically enhance the impact on the emotional sphere of the individual, simultaneously facilitating their more rapid memorization" (Hacıyev, 1976, p. 52).

The fact that this phenomenon exists and is fully capable of being reproduced in speech is demonstrated by the functioning of the aforementioned linguistic devices in aphorisms. Thus, metaphors in them both color the speech and deepen the understanding of the text. In turn, antonyms automatically direct readers' attention to the use of a similar idea.

Parallelism performs virtually the same function. According to the classic rule, these are sentences of identical structure that follow in strict sequence to emphasize a specific point: "Söz gözəl olar, əgər əməllər onu tamamlayarsa".

Finally, we must mention phonetic matches and mismatches. The law of harmony in the Azerbaijani language is well-known, and in accordance with it, sentence parts in aphorisms are also presented rhythmically. The harmony of individual lexemes creates an additional dynamic effect. The most frequently observed phonetic phenomena are alliteration and assonance.

"Sözümüz sərhəd tanımaz…" (Canlı saz-söz abidəmiz. https://medeniyyet.info.az/page/news/21440/Canli-sazsoz-Abidemiz-.html)

The repetition of the "s" sound here reinforces the melodic rhythm and ensures the aphorism's memorization.

Aphorisms often express complex content in a simple manner. These are, naturally, complex thoughts expressed in simple sentences. However, in some cases, aphorisms can also employ more complex syntactic structures. In this case, the sentence remains concise, but the expressed idea becomes broader and more multilayered.

In Azerbaijani lexicography, aphorisms are primarily recorded in explanatory and phraseological dictionaries. In explanatory dictionaries, aphorisms are often presented as example sentences or quotations (Azərbaycan dili antologiyası, 2012, p. 214). In phraseological dictionaries, they are presented as set expressions. Specialized aphoristic dictionaries indicate the author, source, and semantic explanation of the expression, facilitating their use in scholarly communication (Azərbaycan dilinin izahlı lüğəti, 2006, p. 9). Since aphorisms are short and meaningful expressions, they are presented in dictionaries according to a specific structure and formatting rules. Since the primary goal of dictionaries is to systematically present the wealth of words and expressions in a language, aphorisms are also presented in a specific style and order. Since aphorisms are often independent expressions reflecting the worldview of a specific text or author, their presentation in dictionaries is carefully considered from both a semantic and stylistic perspective.

Fuzuli's poetry is rich in clear, wise words – aphorisms. The poet's wise words also played a significant role in popularizing Fuzuli's poetry, which is the memory of the Azerbaijani people and has enjoyed universal respect throughout the Islamic East for centuries. Leaving aside poems that can be considered the best examples of describing the world of love and affection, let us analyze several examples of the poet's purely socially significant words. The poet demonstrates that:

Cənnəti almaq olmaz axça ilə,

Girmək olmaz behiştə rüşvət ilə.

If everything could be obtained through bribery and career advancement, then the arena of talent, the world of crafts, and the paradise of poetry could not be entered artificially.

In this ghazal, the poet preaches bold and courageous qualities such as willpower, integrity, and independent thinking:

Gühər tək qılma təğyiri-təbiət, dəlsələr bağrın,

Qərar et hər havada, olma şurəngiz dərya tək (Azərbaycan dili antologiyası, 2012, p.405).

The format of aphorisms in dictionaries is based on the following basic principles:

Aphorisms in dictionaries are usually presented in a short and concise form. Objectively speaking, this is a separate and important page of scientific research. Lexicographers, understandably, strive to determine the meaning of a particular aphorism in the most appropriate form. As in terminology, everything here should be presented, if possible, unambiguously, and also closely linked to the context. This context, incidentally, can be not only a purely linguistic text but also have a psychological, socio-philosophical, and literary/artistic bent.

"Gözlər insanın ruhunu göstərir" / "Gözlər, insan ruhunu ətrafa əks etdirən aynadır" (Müselman dünyasının gönderisi)

This is undoubtedly a colorful aphorism. It helps to deeply reveal both the psychological world and the emotional state of a person, using the simplest linguistic means. Scholars have noted that Azerbaijani aphorisms of this type are primarily used in literature and psychology.

Both in the annotation and at the very beginning of this article, we acknowledged the authorship of the aphorisms and specifically emphasized the individual nature of their creation. This same principle is fully observed in lexicography. Moreover, individual authorship clarifies the essence of the aphorism, since each creator possesses their own system of linguistic relationships.

"Həyat qısa, sənə verilən vaxt isə qiymətlidir" (Seneka)

Or "Həyat bir silsilədir; Bir fəsil başqa fəsil üçün bir fasilədir" (Əbu Turxan)

This example is directly attributed to a specific author, who, as we know, was a great philosopher (Seneka) and, in his own spirit and style, demonstrates the value and importance of the category of time.

Aphorisms in dictionaries are often formatted as short sentences or fragments of text. Since an aphorism is intended to convey the main idea in a few words, dictionary compilers are obliged to present them in a minimalist style. In some cases, several aphorisms are listed one after another, relating to the same topic or author. For example:

"Sözlər bir insanın düşüncə gücünü göstərir".

"Sözlərin dəyəri, onların arxasında duran mənadadır".

"Sözlər, həm insanı yıxa, həm də ucalda bilər".

"Sözlər fikirlərimizin qiyafətləridir".

Aphorisms may be presented differently in different types of dictionaries. For example, while general language dictionaries present aphorisms in a simplified form, philosophical or literary dictionaries present them in more detail, in various contexts and in relation to the authors' worldviews.

In general language dictionaries, aphorisms are presented simply as their meaning or as a well-known expression.

In philosophical and literary dictionaries, the meaning and analysis of the aphorism, as well as its corresponding philosophical, social, or literary significance, are explained in detail.

Example:

In a general language dictionary: "Həyat qısa, zaman isə qiymətlidir"

In the philosophical dictionary this aphorism emphasizes the importance of appreciating one's life to the fullest, expressing the boundless and extraordinary nature of time. It is linked to the principle of the 'valuation of time' promoted by Stoic philosophy.

Lexicographers also consider such options as the use of synonyms in the text, which facilitates the understanding of Azerbaijani aphorisms in their various forms.

We will provide examples of the use of synonyms.

"Sözlər bəzən daha çox təsir edir".

Option 1. Synonyms: "Bəzən sözlər davranışdan daha çox gücə sahib olur"

Option 2. "Sözlər çox zaman hərəkətlərdən daha böyük təsirə malikdir"

As with individual terms, in lexicography, aphorisms are often accompanied by laconic commentary. Special explanations clarify the general meaning of the aphorism, define its main idea, and demonstrate its potential for use in various types of texts.

"İnsan bir dəfə özünü taparsa, dünyanı dəyişdirə bilər".

Here's a commentary on this aphorism: here, like the milestones of some significant phenomenon, factors of psychological self-knowledge, emotional state, and a person's peace and self-confidence are simultaneously present. In summary, it can be concluded that this aphorism captures changes at all the above-mentioned levels, with the individual at the center of attention.

In studying the various functions of aphorisms in modern Azerbaijani, contextual analysis is of no small importance. It is inappropriate to examine them outside of their specific context, as it naturally carries both psychological, ideological, and philosophical subtext. At times, they can be closely linked by a single idea.

"Zaman hər şeyi dəyişdirir"

Or "Zaman hər şeyin dəyərini göstərir"

Here's a contextual analysis: This aphorism contains a philosophical thought that once again emphasizes the transience of social existence, nature, a particular phenomenon, event, and reproductive experience, etcs. The idea of the infinity of both nature and time runs through it like a red thread.

Conclusion. Thus, from all of the above in our article, the following conclusions and generalizations can be drawn: aphorisms in the Azerbaijani language represent an important and striking fragment in the overall lexical-semantic picture. Both their linguistic and structural features undoubtedly enrich the language, as they draw on cultural, spiritual, and aesthetic values. The use of national aphorisms in lexicography is a separate and responsible task for dictionary creators. The linguistic and structural features of Azerbaijani aphorisms are so significant that they simultaneously enrich the lexical and semantic field of ideas and figurative expressions. They are clearly reflected in various types of structures. A correct understanding of aphorisms confirms their profound meaning and clearly indicates their significant linguistic potential. The stylistic quality of the aphorisms, in turn, creates a powerful aura that gives a corresponding impetus to their central meaning. This is facilitated by their reliance on the emotional sphere of the individual, on the one hand, and on mentality, on the other. And what is imprinted in people's memory is all the more associated with its profound meaning and inner content. This allows us to objectively evaluate the main features and characteristics of Azerbaijani aphorisms from linguistic, psychological, philosophical, and cultural perspectives.

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