Juridisko un Sociālo Zinātņu

BALTIJAS ŽURNĀLS

Baltic Journal of Legal and Social Sciences

Juridisko un Sociālo Zinātņu BALTIJAS ŽURNĀLS

Rīga:
Baltijas Starptautiskā Akadēmija
ISSN 2592-8813

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BALTIJA
PUBLISHING

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Baltic Journal of Legal and Social Sciences,
Number 2. Riga, Latvia : "Baltija Publishing", 2026, 542 pages.

Baltic Journal of Legal and Social Sciences is included
in databases ERIH+ and Index Copernicus.

Baltic International Academy is a co-publisher of this periodical.
Printed and bound in Riga by LLC Publishing House "Baltija Publishing".
Journal is available: www.baltijapublishing.lv/index.php/bjlss
DOI: https://doi.org/10.30525/2592-8813

Type of publication from the application:
Journal-Digital-Online
Issue ISSN 2592-8813

Contents

THEORY AND PRACTICES OF LAW & PUBLIC ADMINISTRATION **9**

Oleksii Biriukov

THE ROLE OF MANAGEMENT AND ADMINISTRATION IN THE DEVELOPMENT OF THE US ECONOMY....9

Vitalii Holets

HISTORICAL STAGES IN THE FORMATION OF THE UKRAINIAN NATION....20

Anton Koss

STATE SUPPORT FOR MANAGEMENT IN INTEGRATING UKRAINIAN DAIRY ENTERPRISES INTO GLOBAL VALUE CHAINS....29

Larisa Kovalenko, Artem Popravko, Maxim Kolesnikov

ACTIVITIES OF THE SECURITY SERVICE OF UKRAINE IN THE ADMINISTRATIVE AND POLITICAL SPHERE....36

Oleksandr Likhota

STRATEGIC MANAGEMENT EVALUATION OF U.S. INNOVATION POLICY: OPERATIONALIZING THE LIFEG FRAMEWORK....43

Artem Minkov

THEORETICAL AND METHODOLOGICAL FOUNDATIONS OF CRISIS MANAGEMENT FOR ENTERPRISES IN THE GAS SECTOR UNDER A WARTIME ECONOMY....57

Oleksandr Patlachuk

THE FORMATION OF THE UKRAINIAN NATION: THE LITHUANIAN-POLISH PERIOD AND ITS LEGAL IMPLICATIONS....69

Vasyl Patlachuk, Artem Shyposha

THE GENESIS OF THE CHRISTIAN CONCEPT OF JUST WAR IN THE POLITICAL AND LEGAL DOCTRINE OF AMVROSII MEDIOLANSKYI....82

Vasyl Patlachuk

THE FORMATION OF THE UKRAINIAN ETHNIC COMMUNITY: THE OLD RUSSIAN PERIOD AND KIEVAN RUS'....91

Mykhailo Popovych

MANAGEMENT IN THE CONTEXT OF UKRAINE'S ECONOMIC RESILIENCE....100

Yevhen Shymansky

NOTARIAL SYSTEMS IN COUNTRIES BELONGING TO THE ROMAN-GERMANIC LEGAL FAMILY....108

Stanislav Sirenko

STRATEGIC MANAGEMENT OF US INNOVATION SYSTEMS IN THE CONTEXT OF GLOBAL MODELS OF INNOVATION MANAGEMENT.....118

Yevhen Zakrevskyi

MANAGEMENT AND THE ORGANISATIONAL AND ECONOMIC MECHANISM FOR THE RECONSTRUCTION OF POST-WAR UKRAINE: ISSUES OF THEORY AND PRACTICE.....134

THEORY AND INSTITUTIONS OF EDUCATION 140

Ali Abdullayev

HISTORICAL KNOWLEDGE AS A CORE COMPONENT OF PATRIOTIC CULTURE IN PRIMARY SCHOOL PUPILS.....140

Lamiya Aliyeva

DEVELOPMENT OF MULTICULTURAL COMPETENCE THROUGH COMMUNICATIVE ENGLISH LANGUAGE PRACTICES IN PRIMARY SCHOOLS.....145

Elgun Muhammadali Aslanov, Jeyran Elshan Valiyeva, Elvira Ismayil Ahmadova, Gunay Shohraddin Kuliyeva

FEATURES OF THE IMPLEMENTATION OF NEW CREATIVE TECHNOLOGIES AIMED AT THE FORMATION AND DEVELOPMENT OF CREATIVE AND CRITICAL THINKING OF AN INDIVIDUAL.....151

Elnara Bayram Ganbarova

WORLD LITERATURE TEXTS AS A PANACEA FOR TEACHING ENGLISH IN MODERN AZERBAIJANI UNIVERSITIES 160

Aida Guliyeva

FROM TRADITION TO INNOVATION: THE TRANSFORMATION OF SCHOOL TECHNOLOGIES IN AZERBAIJAN SINCE THE SECOND HALF OF THE 20TH CENTURY.....166

Khalide Aydin Hamidova

COMPARATIVE ANALYSIS OF THE IMPACT OF STRATEGIC PLANNING ON INSTITUTIONAL EFFECTIVENESS IN HIGHER EDUCATION INSTITUTIONS: THE EXPERIENCE OF AZERBAIJAN AND TÜRKIYE.....171

Liubov Kibenko, Oksana Kravchuk

THE EDUCATIONAL POTENTIAL OF VIDEO RESOURCES IN DEVELOPING THE AUDITORY COMPETENCE OF HIGHER EDUCATION STUDENTS WHEN LEARNING A FOREIGN LANGUAGE.....180

Halyna Lysak, Olha Pavlyk

BORROWINGS AND CULTURAL EXCHANGE BETWEEN ENGLISH AND GERMAN THROUGHOUT HISTORY.....187

Mahbuba Mammadova

THE EMERGENCE AND DEVELOPMENT OF PRIMARY EDUCATION PEDAGOGY.....195

Nadiia Salamin

DIGITALIZATION OF ENGLISH LANGUAGE TRAINING FOR FIRE AND RESCUE SERVICE PROFESSIONALS: INNOVATIVE APPROACHES AND INTERNATIONAL STANDARDS.....203

Inna Seredina, Nataliia Horidko

INTEGRATING ENTREPRENEURIAL COMPONENTS INTO THE VOCATIONAL TRAINING OF EXPERTS: INTERNATIONAL AND UKRAINIAN EXPERIENCE.....210

Roya Shikhaliyeva

PREPARATION OF FUTURE ENGLISH TEACHERS IN THE CONTEXT OF COMPETENCY-BASED EDUCATION.....221

Parvana Isa Suleymanova

ISSUES OF DEVELOPING STUDENTS' SPEECH CULTURE THROUGH THE USE OF FIGURATIVE LANGUAGE DEVICES.....227

Anatolii Sustrietov, Olha Stupak

TRANSFORMATIVE PROCESSES OF DIGITALISATION IN HIGHER EDUCATION: HISTORICAL AND ANALYTICAL ASPECTS.....237

THEORY AND HISTORY OF CULTURE **244**

Elnara Eldar Kazimova

PRESERVATION AND DIGITAL ARCHIVING OF AZERBAIJANI CARPET HERITAGE THROUGH ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS (IN THE CONTEXT OF LITERARY CARPETS).....244

Oleksandr Poberailo, Svitlana Rybalko

AUDIOVISUAL STRATEGIES IN INTERACTIVE FMV PROJECTS FOR THE 3DO INTERACTIVE MULTIPLAYER PLATFORM.....251

THEORY AND INNOVATIONS OF SOCIOLOGY **262**

Pari Namazzade, Jeyhuna Allahverdiyeva

THE IMPACT OF CLIMATE CHANGE ON SOCIAL STRUCTURE AND SOCIAL EQUALITY.....262

Ruslan Rahimli

DIGITAL TRANSNATIONALISM: SOCIAL MEDIA AND THE SOCIAL BEHAVIORS OF AZERBAIJANIS IN EUROPE.....272

THEORY AND DEVELOPMENT OF POLITOLOGY & HISTORY **282**

Rauf Abbasov

SOCIAL REVIVAL IN THE POST-WAR PERIOD:
THE DOST CONCEPT AS IMPLEMENTED IN KARABAKH 282

Sevinj Abbasova

MÖMINƏ XATIN AS A METAPHYSICAL SYMBOL OF AZERBAIJANI FEMALE SUFISM: A HISTORICAL, ARCHITECTURAL, AND MYSTICAL ANALYSIS..... 292

Shafag Firudin Ahmadova

NEW POLITICAL AND ECONOMIC REALITIES
IN THE POST-CONFLICT SOUTH CAUCASUS..... 297

Serhii Averianov, Artem Kucherov

BEYOND SOFT POWER: THE TRANSFORMATION
OF SINO-THAI DIPLOMATIC RELATIONS..... 303

Taras Batenko

THE THIRTY YEARS' WAR (1618–1648): CLIMATIC CONTEXT, GEOPOLITICAL CONSEQUENCES AND THE MATERIAL CULTURE OF THE AGE..... 311

Aytakin Elkhan Gasimova

CULTURAL HERITAGE RESTORATION AND INTEGRATION IN LIBERATED TERRITORIES AS AZERBAIJAN'S POST-CONFLICT SOFT POWER STRATEGY..... 323

Tamerlan Hajiyev

BEYOND COMPLIANCE: EMBEDDING ETHICS-BY-DESIGN
IN ARTIFICIAL INTELLIGENCE SYSTEMS UNDER THE EU AI ACT..... 329

Jahangir Hasanov

DIGITAL EDUCATION, LINGUISTIC INTEGRATION, AND SOFT POWER
IN THE TURKIC WORLD..... 341

Parvın Ibrahımova

ACTIVITIES BY PRESIDENT OF THE REPUBLIC OF AZERBAIJAN ILHAM ALIYEV TOWARDS RESTORATION OF THE TERRITORIAL INTEGRITY
OF THE REPUBLIC OF AZERBAIJAN..... 350

Dmytro Kobzar

PUBLIC AND POLITICAL LIFE OF THE JEWISH COMMUNITY
IN THE TERRITORIES OF THE NORTHERN DISTRICT OF KHERSON PROVINCE
IN THE SECOND HALF OF THE 19TH – BEGINNING OF THE 20TH CENTURY..... 357

*Arif Mammadov, Durdana Yusifova, Huseyn Mammadzade,
Aresta Mammadzade, Kifayat Aliyeva*

ARCHAEOLOGICAL EXCAVATIONS AT THE RED CHURCH
KHOJAVEND DISTRICT..... 363

Ulfat Mehdiyev

HUMAN DEVELOPMENT MANAGEMENT IN THE AI ERA AS A TOOL FOR ACHIEVING SUSTAINABLE DEVELOPMENT IN THE REPUBLIC OF AZERBAIJAN..... 371

Kamil Miriyev

AN ASSESSMENT OF THE STRUCTURAL CHANGES GENERATED BY THE STRATEGIES OF "DEMOCRACY EXPORT" AND "REGIME CHANGE" ON POLITICAL STABILITY, GOVERNANCE CULTURE, AND PUBLIC LEGITIMACY IN THE ARAB WORLD..... 379

Nadiia Mordzynska

CONCEPTUAL TRANSFORMATION OF THE NOTION OF SOLIDARITY IN THE CONDITIONS OF POLYCRISIS..... 388

Bahruz Aliovsat Nazarov

ARTIFICIAL INTELLIGENCE TECHNOLOGIES AS A TOOL OF CONTROLLED CHAOS IN MODERN INTERNATIONAL RELATIONS..... 397

Yevhen Nikolskiy, Anna Lill-Bezak

ELIZABETH II AS A PHENOMENON OF SUPRAPOLITICAL META-AUTHORITY IN A MEDIATIZED SOCIETY..... 405

Nisa Fazil Pashayeva

GLOBAL PROBLEMS AND INTERNATIONAL YOUTH POLICY IN AZERBAIJAN..... 413

Durdana Yusifova

THE HISTORY OF ARCHAEOLOGICAL RESEARCH OF AZERBAIJAN'S ARAZ RIVERSIDE MONUMENTS..... 420

THEORY AND IMPROVEMENT OF PSYCHOLOGY 426

Volodymyr Koss

PSYCHOLOGICAL CHARACTERISTICS OF THE PROFESSIONAL RESILIENCE OF PSYCHOLOGISTS IN THE SECURITY AND DEFENCE SECTOR DURING THE PERIOD OF MARTIAL LAW IN UKRAINE..... 426

Vitaliy Saifutdinov

MANIFESTATIONS OF PROFESSIONAL DESTRUCTION AND PSYCHO-EMOTIONAL TENSION AMONG POLICE OFFICERS UNDER THE INFLUENCE OF CONTEMPORARY EXTREME FACTORS..... 437

Viktoriia Vinnikova, Liudmyla Avramenko

PSYCHOLOGICAL FEATURES OF PERSONNEL MOTIVATION..... 444

Iryna Vlasiuk, Myron Andrushchyshyn

MEDIATION IN THE RELIGIOUS SPHERE: MYTH OR REALITY?..... 454

Lesia Vysochan, Liudmyla Kharlai

THE PSYCHOLOGICAL WELL-BEING OF STUDENTS AND TEACHERS IN THE CONTEXT OF A SAFE DIGITAL ENVIRONMENT..... 459

THEORY AND PERSPECTIVES OF PHILOLOGY 465

Vusala Aghabayli

LINGUISTIC APPROACHES TO SELFHOOD AND CULTURAL IDENTITY FORMATION IN LITERARY DISCOURSE 465

Aygun Ahmadova

DEVELOPMENT OF THE AZERBAIJANI LITERARY LANGUAGE IN THE EARLY 20TH CENTURY IN THE WORK OF TOFIG HAJIYEV..... 473

Leyla Eldar Hajiyeva

PSEUDONYM AS AN INTEGRAL ELEMENT IN THE WORKS OF AZERBAIJANI, ENGLISH AND AMERICAN WRITERS AND POETS..... 479

Mahira Hajiyeva

NARRATIVE VOICE: CONSTRUCTING LANGUAGE AND CULTURAL IDENTITY IN POSTCOLONIAL NARRATIVES..... 486

Gila Huseynli

MEMORY, UNRELIABLE NARRATION, AND THE TRANSFORMATION OF THE BILDUNGSROMAN IN JULIAN BARNES'S "THE SENSE OF AN ENDING"..... 493

Naila Ismikhan Huseynova

WORD CHOICE PROBLEMS IN LITERARY TRANSLATIONS FROM GERMAN INTO AZERBAIJANI TURKISH..... 501

Yegana Huseynova

THE REALITIES OF "LORD OF THE FLIES"..... 511

Mehriban Mammadli

HUMOROUS DISCOURSE IN ENGLISH AND ITS FUNCTIONS..... 518

Aytan Suleymanova

COMPARATIVE ANALYSIS OF MULTIMODALITY IN BRITISH TABLOID AND BROADSHEET NEWSPAPERS..... 524

Khanim Rza Sultanova

THE POETICS OF MYTHIC CONSCIOUSNESS: WORD, MOTHER, AND CREATION IN THE CREATIVE WORK OF MAHIRA NAGHIGHIZI..... 532

Aygun Yusubova

THE PROBLEM OF SOCIAL ENVIRONMENT AND INDIVIDUAL FREEDOM IN AZIZAH JAFARZADEH'S "ZARRINTAJ-TAHIRA" AND DORIS LESSING'S "THE GOLDEN NOTEBOOK"..... 538

THEORY AND PRACTICES OF LAW & PUBLIC ADMINISTRATION

DOI https://doi.org/10.30525/2592-8813-2026-2-1

THE ROLE OF MANAGEMENT AND ADMINISTRATION IN THE DEVELOPMENT OF THE US ECONOMY

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Abstract. The article examines the relationship between management and administrative practices and the economic development of the United States. The relevance of the study is determined by rapid technological advancements, the need to optimize management processes, and the enhancement of innovation performance across economic sectors. The study employs an integrated and systemic approach, econometric modeling, SWOT analysis, KPI assessment, process reengineering, and productivity evaluation. Particular attention is given to O. Likhota's practical research on the integration of digital technologies and motivation systems into management processes. The research indicates that high-tech companies implementing digitalization, flexible structures, reengineering, and motivation systems demonstrate an 18–22% increase in productivity and a 15–20% growth in innovation activity. Traditional manufacturing enterprises achieve 8–12% productivity gains, while government agencies reduce program implementation time by 20–25%. A systemic approach ensures effective coordination of processes and enhances organizational competitiveness. The results provide guidelines for optimizing management and administrative practices, improving resource efficiency, fostering innovation, and enhancing economic performance in organizations across the United States.

Key words: management, administration, digitalization, process optimization, innovation, US economy, productivity, motivation systems, process reengineering, integrated approach.

Introduction. Management and administration are key factors in the effective functioning of modern economies, particularly the U.S. economy. In today's environment of globalization, intense competition, and rapid technological change, the role of management practices and administrative mechanisms is growing significantly, as they determine the ability of businesses and government agencies to respond quickly to market challenges and ensure sustainable economic growth (Drucker, 1999).

Management, in a broad sense, involves planning, organizing, motivating, and controlling resources to achieve an organization's strategic goals. Administration, as a component of management, encompasses ensuring effective interaction between departments, compliance with legal norms, and the implementation of standards and procedures that guarantee the stability and predictability of operations (Koontz, 2010).

The U.S. economy is one of the most dynamic and innovative in the world. Its development is largely determined by the effectiveness of management systems at the level of enterprises, government agencies, and financial institutions. Practice shows that high-quality management practices contribute to increased labor productivity, cost optimization, the stimulation of innovation, and the attraction of investment (Porter, 1990).

Global trends in management development, such as flexible management structures, the adoption of digital technologies, the use of data analytics for decision-making, and the integration of corporate social responsibility strategies, directly impact the economic performance of the United States. At the

same time, the successful administration of public and private organizations ensures not only economic growth but also social stability and competitiveness on the international stage (Drucker, 1999).

Thus, the global context confirms the critical role of management and administration in shaping an innovative, competitive, and sustainable U.S. economy, which justifies the need for a detailed study of these aspects in contemporary economic conditions.

The modern U.S. economy is characterized by a high level of innovation and significant competition in global markets. However, the effectiveness of management and administration, despite the overall high level of development, remains critical for ensuring sustainable economic growth and enhancing the competitiveness of domestic enterprises (Drucker, 1999).

The main challenges of modern management in the U.S. economy are linked to the need to adapt traditional management models to digitalization and globalization, the growing role of data analytics in strategic decision-making, balancing the centralization of management processes with the flexibility of organizational structures, and ensuring the effective administration of government programs supporting entrepreneurship and innovation. (Koontz, 2010).

The relevance of this study stems from the fact that management and administrative practices directly influence investment levels, the development of high-tech sectors, job creation, and the improvement of overall economic productivity. Insufficient management effectiveness can lead to a loss of competitive advantages, a slowdown in technological progress, and insufficient integration of the national economy into global economic processes (Drucker, 1999).

Research into management and administration issues in the United States allows us not only to assess the current state of management practices but also to identify strategic directions for improving these processes. These directions include: the development of corporate governance systems, the implementation of innovative human resource management methods, the automation of administrative processes, and effective coordination between the public and private sectors (Koontz, 2010).

The conclusion from this section is that to ensure sustainable economic growth and maintain the U.S.'s global competitiveness, continuous improvement of management and administrative practices is necessary at all levels – from government regulation to corporate governance (Porter, 1990).

The scientific and practical significance of studying aspects of management and administration in the U.S. economy lies in identifying the key mechanisms that ensure the effective functioning of the national economy and enhance its competitiveness in the global market. Studying these mechanisms allows for the development of tools to optimize management processes at the level of government agencies, enterprises, and organizations, as well as to improve the efficiency of resource administration and strategic planning (Drucker, 1990).

Particular attention should be paid to analyzing the integration of management and administration into the processes of innovative development and the digitalization of the economy. Effective project management, the use of data analytics, and the implementation of modern corporate governance methods and administrative practices create the conditions for accelerating technological progress, attracting investment, and increasing labor productivity (Koontz, 2010).

The rationale for choosing this research topic is also linked to global economic development trends, where the role of management and administration is crucial for building competitive advantages in the international market. The implementation of effective management practices not only enhances economic efficiency but also fosters socio-economic stability, promotes the development of innovation clusters, and ensures the integration of the U.S. economy into global economic processes (Porter, 1990).

The study also has practical significance for the scientific community and economic practitioners, as it allows for:

- assessing the current state of management and administration in the United States;
- identifying key problems and challenges that hinder the effectiveness of management processes;

• develop recommendations for optimizing management and administrative mechanisms to enhance the economy's productivity and innovative potential.

The scientific and practical significance of the topic justifies the need for a comprehensive study of management and administration, their interaction, and their impact on the economic development of the United States, making the topic relevant both for theoretical science and for practical application in management activities (Koontz, 2010).

Main text. The purpose of this article is to conduct a comprehensive analysis of aspects of management and administration in the U.S. economy and to determine their impact on economic development, innovation, and competitiveness at the national and global levels.

To achieve this goal, the following main objectives have been identified:

1. To analyze theoretical approaches to management and administration, their historical development, contemporary models, and their integration into the management practices of U.S. businesses and government agencies.
2. Examine the role of management and administration in the development of the U.S. economy, particularly in ensuring productivity, attracting investment, supporting high-tech sectors, and developing innovation clusters.
3. Identify the main problems and challenges affecting the effectiveness of management and administrative processes in the U.S., including digitalization, globalization, and structural changes in the economy.
4. Assess the impact of modern management technologies and administrative practices on economic productivity, the commercialization of innovations, and the integration of the national economy into global processes.
5. Develop practical recommendations for improving management and administrative mechanisms at the level of public and private organizations to enhance the economic efficiency and competitiveness of the United States.

This approach allows for a comprehensive study of management and administration issues, identifies their impact on the economy, and prepares scientifically grounded recommendations for practical application.

A wide range of sources was used to study aspects of management and administration in the U.S. economy, including scientific works, official statistics, analytical reports, and modern methodological developments. Particular attention is paid to the works of O. Likhota, which highlight the role of management and administration in shaping an innovative economy and the impact of management practices on the development of high-tech sectors (Likhota, 2025). Likhota's research provides a deeper understanding of the integration of strategic management and administrative mechanisms into the national economy, as well as their impact on the effectiveness of entrepreneurial activity and the commercialization of innovations.

In addition, classical and contemporary sources of English-language literature were utilized:

• P. Drucker, «Management Challenges for the 21st Century», which examines global management trends and the challenges of managerial practice in a highly competitive environment (Drucker, 1999);

• G. Koontz and H. Weirich, «Essentials of Management», which outline the principles of effective administration and modern management models (Koontz, 2010);

• M. Porter's «Competitive Advantage of Nations», which demonstrates the interconnection between management strategies and the economic competitiveness of national economies (Porter, 1990).

Official U.S. statistics were used for the empirical analysis, including data from the Bureau of Economic Analysis (BEA), the Department of Labor, and other government agencies. These sources ensure the objectivity and reliability of the results, allowing for the integration of theoretical management concepts with practical economic indicators.

The combination of literary sources, official statistics, and methodological studies provides a solid foundation for a comprehensive analysis of management and administration in the United States and their impact on economic development.

Contemporary research in management and administration employs a variety of theoretical approaches that enable a comprehensive assessment of the interaction between management practices and economic development. Key concepts include classical management theories, behavioral and systems approaches, as well as modern models of strategic and innovation management (Drucker, 1999).

O. Likhota's works are particularly valuable in this context, as they demonstrate the integration of strategic management and administrative practices into the U.S. national economy. Effective management in high-tech and innovative sectors of the economy depends not only on classical management principles but also on the ability of organizations to adapt administrative processes to rapid changes in the market, technology, and competitive environment. In his works, O. Likhota analyzes in detail the mechanisms for coordinating management subsystems, motivation and control systems, as well as the integration of strategic planning and innovative solutions, which contributes to increased productivity and economic efficiency (Likhota, 2025).

Among the classical approaches to management, the following are worth highlighting:

- The classical school of management, which emphasizes organizational structure, process regulation, and the hierarchy of decision-making. This approach ensures clarity in the distribution of duties, responsibilities, and control over task execution, which is fundamental to the stable functioning of enterprises and government agencies (Koontz, 2010).
- The behavioral approach, which views management through the lens of employee motivation, team interaction, and socio-psychological aspects. Its application allows for improving team effectiveness, optimizing internal processes, and fostering a productive organizational culture.
- The systems approach, which views an organization as a complex of interconnected subsystems: production, finance, human resources, technology, and management processes. In this approach, administration serves as an integrator, ensuring coordination, consistency, and optimization of resources, which enhances the efficiency of the economic system (Porter, 1990).
- The strategic approach, which focuses on long-term planning, risk analysis, forecasting, and the integration of innovative processes into organizations' business models. This approach enables enterprises and government agencies to adapt to a dynamic economic environment and maintain sustainable competitive advantages.

In the context of current challenges, particular attention is paid to innovation and digital management, as well as knowledge management. The use of data analytics, digital platforms for planning and control, and the automation of management and administrative processes enables faster decision-making, more accurate forecasting, and greater organizational adaptability to changes in the market and technology. It is precisely the ability to effectively integrate these technologies into the management system that determines the competitiveness of enterprises and economic sectors (Likhota, 2025).

In addition, O. Likhota emphasizes the importance of a comprehensive approach to analyzing the interaction between management and administration. In his view, only by combining classical management principles, systemic and strategic approaches with practical administrative methods can one achieve maximum efficiency in organizational structures and optimize economic outcomes at the level of enterprises, clusters, and the national economy as a whole. This is particularly relevant for the high-tech sectors of the United States, where rapid innovation cycles and global competition place heightened demands on managerial competencies and administration (Likhota 2025).

An expanded combination of classical and modern theoretical approaches with practical recommendations allows for the creation of a comprehensive framework for assessing the role of management and administration in the development of the U.S. economy. This approach takes into account

the economic, social, and technological aspects of management activities, providing a solid foundation for further analysis of economic indicators and the development of practical recommendations for improving management processes in various sectors of the economy.

To assess the impact of management and administration on the development of the U.S. economy, various methods of analyzing economic indicators were used, allowing not only for an evaluation of the overall state of the national economy but also for the identification of specific relationships between management practices and economic performance.

The primary data sources were official U.S. government statistics, including data from the Bureau of Economic Analysis (BEA) and the U.S. Department of Labor, as well as reports from institutions such as the Federal Reserve and the U.S. Census Bureau. The data covers key economic indicators: gross domestic product (GDP), labor productivity, investment volumes in high-tech sectors, employment trends, and the level of innovation activity (Drucker, 1999).

The following methods were used for statistical analysis:

- Correlation analysis, which allows identifying the relationship between management performance indicators and economic outcomes. For example, the correlation between the implementation of modern management practices (including the digitization of administrative processes) and labor productivity growth in high-tech industries was analyzed (Likhota, 2025).
- Regression analysis, which made it possible to model the dependence of economic indicators (e.g., GDP per capita or innovation investments) on the effectiveness of management and administration at enterprises in various sectors of the U.S. economy. The results of the regression analysis showed a statistically significant impact of management practices on increased economic productivity and investment attractiveness (Koontz, 2010).

Particular attention was paid to comparative analysis, which allows for the assessment of management and administrative effectiveness across various sectors of the U.S. economy. Case studies were conducted on leading companies and government organizations implementing innovative management practices, and their impact on productivity, investment attraction, and the development of innovative projects was assessed (Porter, 1990).

In addition, SWOT analysis was used for a comprehensive assessment of management and administrative effectiveness, which helps identify the strengths, weaknesses, opportunities, and threats of management practices. This method, combined with KPI analysis (key performance indicators), made it possible to evaluate the results of management decisions at the level of enterprises and regional economic systems, and also ensured the identification of optimal development strategies (Likhota, 2025).

A systematic approach was used for the integrative analysis, which allows for an assessment of the interrelationship between management and administration and all subsystems of the economy. Modeling of various scenarios showed that comprehensive improvement of management and administrative processes contributes to accelerating innovative development, increasing labor productivity, and boosting investment activity (Drucker, 1999).

The use of a comprehensive set of methods for analyzing economic indicators allows for obtaining an objective picture of the impact of management and administration on the economic development of the United States, identifying weaknesses, and developing practical recommendations for improving the efficiency of management processes in high-tech and innovative sectors of the economy.

To conduct a detailed assessment of the impact of management and administration on the U.S. economy, the methods of comparative analysis and case studies were employed, which allow for determining the effectiveness of management practices across various sectors of the economy and at different organizational levels.

A comparative analysis was conducted between high-tech and innovative companies where management is integrated with digital administrative processes, such as companies in the IT and biotechnology sectors, which demonstrate high productivity thanks to the implementation of flexible

management structures and incentive systems that align with market dynamics (Drucker, 1999). Compared to traditional manufacturing enterprises, where management practices remain classical with a centralized hierarchy and standard administrative procedures, such structures prove to be less adaptable to innovation and rapid changes in the external environment (Likhota, 2025). Government agencies and administrative bodies demonstrate varying levels of management effectiveness depending on the degree of implementation of modern administrative practices, such as e-government, the digitization of procedures, and the integration of analytical data into the decision-making process (Koontz, 2010).

Case studies were used for an in-depth analysis of specific organizations and projects that demonstrate the successful integration of management and administration into economic activity. For example, Google (Alphabet Inc.) has implemented flexible management structures, project management, and automated resource administration systems, ensuring high labor productivity and innovative activity (Porter, 1990). Tesla, Inc. demonstrates strategic management of innovation processes, an active role for administrative oversight, and the digitization of production, which allows for shorter development cycles and increased product competitiveness (Drucker, 1999). The U.S. Department of Commerce is an example of effective government administration that uses modern analytical systems to manage economic initiatives and investment programs (Likhota, 2025).

A comparative analysis and case studies revealed that the most effective management and administrative practices are characterized by the integration of digital technologies into administrative processes, the flexibility of management structures and project-based organization, effective motivation and control systems, the active use of data analytics for strategic decision-making, as well as the ability to quickly adapt to changes in the market environment and technological innovations.

Comparative analysis and case studies allow not only for evaluating the effectiveness of management and administration across various sectors of the U.S. economy but also for identifying key factors influencing the productivity and innovative potential of enterprises and organizations. This creates a scientific basis for developing recommendations on optimizing management processes at the practical level.

Assessing the effectiveness of management and administration is critical for determining their impact on the U.S. economy and the innovative development of enterprises. The study employs a set of methods that allows for the quantitative and qualitative assessment of management and administrative processes.

A SWOT analysis of management structures and administrative processes was applied to identify strengths, weaknesses, opportunities, and threats in the activities of organizations across various economic sectors. This method allows for the systematization of information regarding internal and external factors that influence the effectiveness of management and administration, and for the identification of priorities for optimizing management decisions (Drucker, 1999).

The use of KPI analysis makes it possible to evaluate the effectiveness of management decisions at specific organizational levels – from businesses to government agencies. Key indicators include: labor productivity, innovation activity, financial stability, decision-making efficiency, and the quality of administrative services (Likhota, 2025). KPIs serve not only as a tool for evaluating results but also for encouraging the adaptation of management structures to changing market conditions.

The methodology included an assessment of management processes, their structural organization, and the degree of digitization of administrative procedures. The study examined automated resource management systems, analytical platforms for strategic decision-making, and digital performance monitoring tools (Likhota, 2025).

To determine the impact of management on economic outcomes, a comparative analysis was conducted of high-tech companies, traditional manufacturing enterprises, and government agencies. This allowed for the identification of optimal management practices and administrative approaches that contribute to increased productivity, innovation, and enhanced competitiveness (Drucker, 1999).

Methods for forecasting the effectiveness of management decisions were used, including scenario modeling and econometric analysis. These methods allow for the assessment of the potential impact of various management strategies on economic indicators and the innovative activity of organizations (Koontz, 2010).

A systems approach was applied for a comprehensive assessment of management and administrative effectiveness, allowing for an evaluation of the interaction between the management, administration, and economic development subsystems. This approach provides a comprehensive understanding of the effectiveness of management practices and their impact on economic outcomes (Likhota, 2025).

All methods were validated by empirical data from official sources and case studies of leading U.S. organizations. O. Likhota emphasizes the importance of using combined methods that integrate quantitative and qualitative indicators to ensure the reliability and representativeness of the results (Likhota, 2025).

The comprehensive application of these methods allows for a comprehensive assessment of the effectiveness of management and administration, the identification of key performance factors, and the development of practical recommendations for improving management and administrative processes to enhance the competitiveness and innovative potential of the U.S. economy.

Integrative analysis, combined with a systems approach, allows for an assessment of the relationship between management and administration and economic outcomes at various organizational levels and on the scale of the U.S. national economy. This approach takes into account the complex interaction of management subsystems, administrative mechanisms, innovation processes, and market factors (Drucker, 1999).

The systems approach views an organization as a single, integrated system where all subsystems – production, financial, human resources, technological, and managerial – are interconnected. Administrative efficiency in such a system is ensured by optimizing information flows, coordinating the activities of departments, and applying digital technologies for managerial decision-making (Likhota, 2025).

Integrative analysis of management practices involves combining the results of quantitative and qualitative analysis to assess management effectiveness. It allows for the identification of interrelationships between administrative processes, the implementation of innovations, and the economic performance of organizations. The integrative approach provides a comprehensive view of management activities that simultaneously takes into account financial, technological, and social aspects (Koontz, 2010).

The use of econometric and systems modeling makes it possible to predict the impact of management decisions on economic outcomes. For example, models show that increased digitalization of administration and effective management are positively correlated with innovation activity and labor productivity in high-tech sectors of the economy (Drucker, 1999).

A systems approach allows us to assess how administrative procedures influence strategic decisions. Effective administration ensures the timely receipt of analytical information, monitoring of the implementation of strategic initiatives, and the adjustment of management decisions based on the analysis of results (Likhota, 2025).

Integrative analysis allows for comparing the effectiveness of managerial and administrative practices in both private companies and government agencies. This creates a scientific basis for recommendations on optimizing organizational structures, increasing productivity, and supporting innovative development (Koontz, 2010).

The application of systems and integrative analysis allows for the identification of key success factors in management and administration, the development of recommendations to improve the effectiveness of management processes, and the assessment of potential risks and opportunities for improving organizational systems. This is particularly important for high-tech sectors, where rapid changes require adaptive management structures and effective administration (Drucker, 1999).

Integrative analysis and a systems approach provide a comprehensive understanding of the relationship between management and administration and economic outcomes, enabling the prediction of the effectiveness of management decisions and the development of practical recommendations for enhancing the productivity and innovative potential of organizations.

After applying integrative analysis and a systems approach, results were obtained that allow for the assessment of the effectiveness of management and administration across various sectors of the U.S. economy. The analysis covered private high-tech companies, traditional manufacturing enterprises, and government agencies.

High-tech companies, such as IT and biotechnology firms, demonstrate high labor productivity and innovative activity thanks to the integration of digital administrative processes, flexible management structures, and incentive systems (Drucker, 1999). KPI analysis showed a 15–20% increase in R&D investment in companies that have implemented automated management systems (Likhota, 2025). Integrative analysis indicates that the digitization of administrative processes correlates with faster decision-making and a reduction in management costs by up to 12% on average (Koontz, 2010).

In traditional manufacturing enterprises, the effectiveness of management practices in classical organizational structures is lower due to a centralized hierarchy and slow adaptation to market changes (Drucker, 1999). Forecasting using econometric models showed that without modernizing administrative processes, productivity growth is limited to 3–5% per year. A SWOT analysis identified weaknesses: insufficient flexibility, a lack of integration of digital tools, and low staff motivation.

Government agencies and administrative institutions demonstrate high efficiency when they implement analytical platforms and e-governance systems (Likhota, 2025). An integration analysis showed that optimizing decision-making procedures reduces the implementation time of government programs by 18–25%. A systematic approach identified key success factors: coordination between departments, process digitization, staff training, and flexible resource planning (Koontz, 2010).

The overall findings of the comparative analysis indicate that the most effective management and administrative practices are characterized by the integration of digital technologies, flexible structures, incentive systems, and an analytical approach to decision-making. The productivity gap between high-tech companies and traditional manufacturing enterprises reaches 15–20%. Government agencies that apply systematic and integrative approaches demonstrate a significant increase in the effectiveness of implementing strategic initiatives and economic programs.

The results allow for the development of recommendations on optimizing management and administrative practices to enhance productivity and foster innovative development of the U.S. economy. The identified factors of effectiveness can be utilized in both corporate and public administration to enhance competitiveness and economic resilience.

Optimizing management and administrative processes is a key factor in increasing the productivity, innovative activity, and competitiveness of organizations in the U.S. The study employs a set of methods that enable the systematic improvement of management and administrative practices at various levels – from businesses to government agencies (Drucker, 1999).

The implementation of digital technologies and automation, particularly the use of digital platforms for administration, such as ERP (Enterprise Resource Planning) systems and analytical systems for resource management, allows for increased accuracy, speed, and transparency of processes. Automation of administrative processes reduces document processing time by up to 40%, minimizes human error, and improves the effectiveness of managerial decision-making (Likhota, 2025).

Reengineering of management processes involves a complete review of existing management procedures and their adaptation to the modern needs of the economy. Reengineering methods include optimizing information flows, reducing redundant operations, and integrating analytical tools for performance monitoring (Hammer, 1993).

The flexible management structures and project-based approach used by high-tech companies in the U.S. enable rapid responses to market changes and innovation challenges. The project-based approach ensures effective resource management and team accountability for results, which increases productivity and reduces costs (Drucker, 1999).

The implementation of incentive systems, such as KPIs, bonus programs, and employee performance evaluation systems, stimulates productive work and facilitates the implementation of innovative projects. Incentive systems must be integrated with administrative processes to ensure the consistency of management decisions (Likhota, 2025).

The use of analytics and forecasting of economic outcomes allows for the adjustment of organizational development strategies by applying methods of econometric modeling, scenario planning, and sensitivity analysis of key indicators (Hammer, 1993).

An integrated approach to optimization, combining digitalization, reengineering, flexible structures, and incentive systems, ensures comprehensive optimization of management and administrative processes. This approach takes into account the interconnection of all organizational subsystems and their impact on economic outcomes at the level of enterprises and government agencies (Drucker, 1999).

The application of these optimization methods allows for improving the effectiveness of management decisions, reducing costs of administrative processes, increasing labor productivity, and creating favorable conditions for the innovative development of the U.S. economy. Process optimization also ensures organizational flexibility and the ability to quickly adapt to changes in the external environment.

The implementation of optimization methods in management and administration makes it possible to assess their impact on productivity, innovation, and overall economic development across various sectors in the United States. The results of this assessment demonstrate that the comprehensive application of digitalization, reengineering, flexible management structures, and incentive systems has a significant positive effect.

Following the implementation of automated administrative systems and the integration of KPIs, the high-tech sector demonstrates an 18–22% increase in productivity and a 15–20% rise in innovation activity (Drucker, 1999). A project-based approach reduces the time required to implement innovative projects by 25–30%, thereby increasing the competitiveness of enterprises. A high level of digitalization and analytics ensures effective resource management and minimizes risks during the implementation of strategic decisions (Likhota, 2025).

Traditional manufacturing enterprises, thanks to optimization methods, increase productivity by 8–12%, reduce management costs by 10–15%, and improve the adaptability of structures to market changes (Hammer, 1993). Reengineering and the integration of digital administrative processes allow for the reduction of functional duplication and the improvement of internal communication efficiency. A SWOT analysis has shown that the implementation of optimization methods strengthens the strengths and reduces the impact of weaknesses in traditional companies.

Government agencies and administrative bodies, thanks to the optimization of administrative processes and the integration of e-governance systems, reduce the time required to implement government programs by 20–25% and improve resource utilization (Drucker, 1999). The use of analytical platforms and forecasting systems improves strategic planning and ensures timely adjustments to management decisions (Likhota, 2025). A systematic approach allows for the assessment of the comprehensive impact of optimization methods on economic outcomes, taking into account the interrelationships between departments and processes.

Overall findings of the effectiveness assessment indicate that the most effective results have been achieved in the high-tech sector, where digitalization, flexible structures, and incentive systems are combined. Traditional enterprises demonstrate a noticeable improvement in efficiency following

the implementation of reengineering and integration methods, but productivity growth rates are lower compared to high-tech companies. Government agencies achieve a significant increase in efficiency through the digitalization of administrative processes and the integration of analytical tools.

An assessment of the results of implementing optimization methods confirms their high effectiveness in increasing productivity, innovation, and organizational adaptability. This allows for the formulation of recommendations for the large-scale implementation of management and administrative practices across various sectors of the U.S. economy, thereby promoting increased competitiveness and economic resilience.

Based on a comprehensive analysis of integration and systems approaches, as well as an assessment of the effectiveness of implementing optimization methods, practical recommendations were developed to improve management and administrative practices across various sectors of the U.S. economy.

First and foremost, the large-scale implementation of ERP systems, analytical platforms, and document workflow automation tools is recommended. This will reduce the time required to process information, increase the transparency of management decisions, and minimize the human factor in decision-making (Drucker, 1999).

High-tech and traditional enterprises must transition to flexible and adaptive structures that allow for rapid responses to changing market conditions. The adoption of project-based and team-based management approaches will enable more efficient use of resources and increased productivity (Likhota, 2025).

A comprehensive review of existing administrative processes is necessary to eliminate redundant functions, optimize information flows, and integrate analytical systems. Likhota emphasizes that reengineering must be based on systematic analysis and forecasting of the impact of changes on economic outcomes.

Integrating employee incentive systems with KPIs will encourage productive work and boost innovation. The practical application of incentive systems will ensure that individual productivity aligns with the organization's strategic goals (Likhota, 2025).

The implementation of econometric modeling, scenario planning, and sensitivity analysis methods will enable the forecasting of the consequences of management decisions, the adjustment of development strategies, and the enhancement of organizational adaptability (Drucker, 1999).

Combining digitalization, flexible structures, reengineering, and motivational systems into a comprehensive strategy for optimizing management and administration will ensure the alignment of all processes, enhance the effectiveness of interdepartmental collaboration, and positively impact organizations' economic performance (Hammer, 1993).

An important element of improvement is the development of competencies among managers and administrative staff regarding the use of modern digital and analytical tools. Regular training and workshops will ensure adaptation to innovative technologies and improve strategic decision-making (Likhota, 2025).

The implementation of the proposed methods will improve the efficiency of management and administrative processes in the private and public sectors, stimulate innovative development, strengthen the competitiveness of organizations, and improve the economic indicators of the U.S. national economy.

Based on a comprehensive study of the relationship between management and administration and economic outcomes in the U.S., the following key findings were obtained, which allow for an assessment of the effectiveness of management practices and their impact on economic development.

The impact of digitalization on productivity and innovation. High-tech companies that have implemented ERP systems and digital administrative platforms demonstrate a significant increase in labor productivity of 18–22% and an increase in innovation activity of 15–20% (Drucker, 1999). Digitalization provides rapid access to information, reduces decision-making time, and cuts management process

costs by 12–15%. Traditional manufacturing enterprises showed a moderate productivity increase of 8–12%, confirming that digital and integration tools are key factors in stimulating innovation.

The data obtained confirm O. Likhota's conclusions that the digitization of administrative processes is critically important for improving management efficiency and economic productivity. At the same time, the lack of a comprehensive approach in traditional sectors limits the potential for economic growth (Likhota, 2025).

The Role of an Integrative and Systems Approach. Applying a systems approach allows us to view an organization as a holistic system where all subsystems – financial, production, human resources, and management – are interconnected. Integrative analysis has shown that combining digitalization, reengineering, flexible structures, and incentive systems ensures a comprehensive increase in efficiency and growth in innovative potential (Koontz, 2010).

This confirms the hypothesis that management and administrative practices must be considered holistically, as individual methods without systemic integration do not yield the expected results. This is particularly true for government agencies, where interaction between departments is a key factor in effectiveness.

Process optimization and management practices. Process reengineering and the implementation of KPIs and incentive systems have shown a significant increase in productivity across all sectors: high-tech companies – 18–22%; traditional manufacturing enterprises – 8–12%; government agencies – a 20–25% reduction in program implementation time (Likhota, 2025).

Process optimization not only improves internal performance metrics but also creates a conducive environment for innovation and adaptation to external challenges. O. Likhota notes that integrating incentive systems with administrative processes ensures a high level of accountability and effectiveness (Likhota, 2025).

Practical significance of the study. The developed methods and recommendations can be used to improve management and administrative practices in high-tech companies, traditional manufacturing sectors, and government agencies. The application of a comprehensive approach increases economic efficiency, promotes the development of innovative activities, and enhances the competitiveness of organizations. The practical significance of the study also lies in the possibility of scaling the proposed methods to various sectors of the U.S. economy and adapting them to the conditions of a constantly changing market environment.

Conclusions. The study confirmed that the effectiveness of management and administrative practices significantly determines the economic development of organizations and the country's economy as a whole. The use of digital technologies, a systematic approach, process reengineering, incentive systems, and integrative analysis allows for increased productivity, stimulates innovation, and ensures organizational flexibility. The practical implementation of the proposed methods enables sustainable economic growth and enhances competitiveness at the national and international levels.

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DOI https://doi.org/10.30525/2592-8813-2026-2-2

HISTORICAL STAGES IN THE FORMATION OF THE UKRAINIAN NATION

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Abstract. The article examines the historical stages of the formation of the Ukrainian nation as a complex and multidimensional process covering the early medieval (Kyivan Rus'), Cossack-Hetman, and modern periods. The key factors of nation-building are analyzed, including culture, language, religion, political institutions, and historical memory. Special attention is paid to the influence of socio-political transformations, external factors, and European ideas on the development of Ukrainian national identity. It is demonstrated that the Ukrainian nation emerged as a result of a long historical evolution, transitioning from an ethno-cultural community to a modern political nation. Each historical stage is characterized by its own specific features while ensuring continuity in national development. The study emphasizes the importance of historical memory and cultural heritage in strengthening national unity under contemporary challenges.

Key words: Ukrainian nation, nation-building, national identity, Kyivan Rus', Cossacks, Hetmanate, national revival, historical memory, statehood.

Introduction. The formation of the Ukrainian nation is a complex and protracted historical process encompassing various stages of social, political, cultural and legal development. A nation, as a socio-political community, does not emerge instantly, but is shaped by a combination of factors, among which historical memory, language, culture, statehood and a shared experience of the struggle for independence are of key importance. In this context, the Ukrainian nation has a unique trajectory of development, determined by both internal processes and external influences.

The relevance of this study stems from the need for a thorough understanding of the historical stages of nation-building in Ukraine amidst contemporary political and social transformations. This issue takes on particular significance in the context of war, globalisation processes and the state's European integration course, which significantly influence the formation of national identity and the consolidation of society. Drawing on historical experience allows us not only to understand the patterns of the Ukrainian nation's development, but also to identify prospects for its further strengthening.

The state of academic research on this issue is characterised by a significant body of work in both domestic and international academic literature. In particular, the issues of national identity and nation-building have been explored by international scholars such as A. Smith (1986), B. Anderson (2006) and E. Hobsbawm (1992), who viewed the nation as an imagined community shaped by cultural and political processes. Ukrainian researchers focus on the specific nature of Ukraine's historical development, the role of the Cossacks, cultural revival and the struggle for statehood in the formation of national consciousness (Hrytsak, 1996; Kasyanov, 1999).

The theoretical significance of the study lies in deepening scientific understanding of the nature of the nation and the mechanisms of its formation, particularly in the context of a prolonged absence of statehood. The practical significance of the work lies in the possibility of using the findings to improve state policy in the areas of national identity, education and cultural development.

The methodological basis of the study is a combination of historical-legal, sociological, cultural and systemic approaches, which allows for a comprehensive examination of the process of the for-

mation of the Ukrainian nation. Such an interdisciplinary approach provides a deeper understanding of the interaction of various factors influencing nation-building.

The structure of the study is organised in accordance with the logic of analysing the historical stages of the formation of the Ukrainian nation. The work systematically examines the early historical, Cossack-Hetman and modern periods, enabling the evolution of national identity to be traced and the key patterns of its development to be identified.

The aim of this study is to provide a comprehensive analysis of the historical stages of the formation of the Ukrainian nation and to identify the key patterns of its development in the context of political, social, cultural and legal transformations. Particular attention is paid to identifying the factors that influenced the formation of national identity and its evolution across different historical periods.

The study aims to understand the process of nation-building as a multi-level phenomenon combining ethnic, political and civic components, as well as to determine the role of historical continuity in the formation of the modern Ukrainian nation.

The main objectives of the study are:

- to analyse the historical stages in the formation of the Ukrainian nation;
- to identify the key factors in nation-building during different historical periods;
- to examine the role of culture, language and religion in the formation of identity;
- to analyse the influence of political institutions on the process of nation-building;
- to assess the significance of legal mechanisms in the development of the nation;
- to investigate the influence of external factors and the international environment;
- to identify contemporary trends in the development of the Ukrainian nation in the context of globalisation and European integration.

The study is based on the comprehensive use of historical, legal, sociological and interdisciplinary approaches, which enables a comprehensive analysis of the process of Ukrainian nation-building. The source base consists of academic works by Ukrainian and foreign authors, historical documents, analytical studies and contemporary concepts of nation-building.

The historical-legal method is used to analyse the evolution of state institutions, legal systems and forms of political organisation within Ukrainian society across different historical periods. It enables us to trace the development of legal norms from customary forms to codified legal systems.

The comparative-historical method is used to compare the Ukrainian experience of nation-building with the processes of nation-formation in European countries. This makes it possible to identify common patterns and specific features of Ukrainian historical development.

The cultural approach is used to analyse the role of culture, language, traditions and symbols in the formation of national identity. Particular attention is paid to the influence of cultural heritage on the processes of social consolidation.

The sociological method is used to study social processes, the structure of society, the transformation of values and the formation of civic identity across different historical periods.

The systemic approach allows us to view the nation as a holistic social system comprising interrelated elements: culture, law, politics, the economy and historical memory. This approach ensures a comprehensive analysis and takes into account the multidimensional nature of the nation-building process.

Main text. The study of the historical stages in the formation of the Ukrainian nation is important not only from an academic but also from a practical perspective, as it enables us to understand contemporary nation-building processes and identify strategic directions for the development of Ukrainian society.

The Old Rus' and Early Historical Period

The initial stage of the formation of the Ukrainian nation is linked to the long-term processes of ethnogenesis among the East Slavic tribes that inhabited the territory of modern-day Ukraine as

early as the early Middle Ages. During this period, there was a gradual unification of various tribal confederations (the Polans, Drevlians, Severians, Ulichs, Tiverians and others), accompanied by the formation of shared economic ties and the development of agriculture, crafts and trade. It was precisely these economic and social factors that formed the basis for the emergence of the first elements of ethno-cultural unity, which later transformed into a more complex form – proto-national identity (Subtelny, 2009).

An important aspect of this process was the formation of customary law, which regulated social relations and facilitated the consolidation of tribal communities. Customary norms defined the rules of coexistence, property, liability and social hierarchy, which created the preconditions for the further development of legal institutions. Thus, even at an early stage of the formation of the Ukrainian nation, a close link between social organisation and legal culture can be observed.

A key stage in the formation of the Ukrainian nation was the establishment of the state of Kievan Rus', which emerged as the first large-scale form of political organisation among the East Slavic peoples. Its emergence facilitated territorial consolidation, the strengthening of political power and the formation of a centralised system of governance. Kievan Rus' became not only a political but also a cultural centre, where the foundations of statehood, diplomacy and law were laid.

Within this state, administrative institutions underwent active development, in particular princely authority, the druzhina organisation and the system of territorial administration. At the same time, the formation of written law played an important role, an example of which is the 'Ruska Pravda', which became one of the first codified legal acts in the region. It codified social relations, defined the legal status of various population groups and contributed to the strengthening of the legal order (Kappeler, 2001).

The adoption of Christianity at the end of the 10th century was of particular significance for the formation of identity. This event marked a turning point that shaped the region's subsequent cultural and civilisational development. Christianity contributed to the spread of literacy, the development of education, literature and the arts, as well as the integration of Kievan Rus' into the European cultural sphere.

The religious factor also played a unifying role, as it shaped a shared system of values, moral norms and worldviews. This helped to strengthen the spiritual unity of the population and foster a collective identity that extended beyond clan and tribal ties.

The socio-political preconditions for the formation of the Ukrainian nation during this period included the development of feudal relations, the growing role of local elites and the gradual formation of social stratification. At the same time, traditional clan structures retained significant influence, shaping the specific nature of social organisation and relations between different groups.

Cultural and linguistic factors played no less important a role. The formation of the Old Russian language as a common means of communication contributed to the consolidation of the population, whilst the development of chronicle-writing ensured the recording of historical events and the transmission of collective memory. Chronicles became an important source for the formation of historical consciousness and national identity.

External factors also had a significant influence on the processes of nation-building. Kievan Rus' actively interacted with the Byzantine Empire, the Scandinavian countries, the nomadic peoples of the steppe, and other states. These contacts fostered cultural exchange, the development of trade and diplomatic relations, which in turn influenced the formation of the political culture and worldview of the population (Plokhy, 2006).

At the same time, external threats, particularly raids by nomadic tribes, contributed to the consolidation of society and the strengthening of military organisation. This fostered a sense of shared interests among the population and a sense of the need to defend their own territory, which is an important element of national identity.

Following the decline of Kievan Rus' and the Mongol invasion, a certain fragmentation of the political landscape occurred, yet cultural and ethnic ties among the population remained intact. It is precisely these ties that ensured the continuity of traditions and laid the foundation for the further development of the Ukrainian nation in subsequent historical periods.

Thus, the Old Rus' and early historical period is fundamental to understanding the process of the formation of the Ukrainian nation. It was during this period that the basic elements of ethno-cultural, religious and political identity were established, which subsequently developed and transformed under the influence of new historical conditions. It is this historical foundation that ensures the continuity of national development and creates the preconditions for the emergence of the modern Ukrainian nation.

The Cossack-Hetman Period

The Cossack-Hetman Period is one of the defining periods in the formation of the Ukrainian nation, as it was during this time that the transition took place from a predominantly ethno-cultural community to a conscious political nation. Chronologically, this period spans the 16th to 18th centuries and is characterised by the emergence of the Cossacks, the development of the Zaporizhian Sich, the formation of the Hetmanate, and the emergence of the first institutions of Ukrainian statehood (Hrytsak, 1996).

The emergence of the Cossacks was driven by a combination of socio-economic, political and military factors. The intensification of serfdom, the restriction of the rights of the Orthodox population within the Polish-Lithuanian Commonwealth, and the constant threat from nomadic peoples contributed to the formation of a new social class – the Cossacks. They acted as free men who united to defend their rights, manage their estates, and participate in military campaigns. The Cossacks became a unique phenomenon, combining the features of a military organisation, a social community and a political institution (Hroch, 1985).

The social structure of the Cossacks was relatively democratic, which distinguished them from the feudal societies of the time. Key principles included equality, collective decision-making and the election of leaders. This fostered the development of a political culture based on citizens' participation in resolving social issues, which became a vital element of national consciousness.

The Zaporizhzhia Sich served as the centre of Cossack life and a unique form of political organisation. It had its own system of governance, administrative structure, military organisation and legal norms. The key governing body was the Cossack Council, which made the most important decisions, including the election of the hetman and the senior officers. This system of governance fostered the development of democratic traditions and the formation of a sense of collective responsibility.

An important aspect of the Sich's functioning was Cossack law, which was based on customary norms and military traditions. It regulated internal relations, determined the procedure for resolving conflicts and ensured discipline. This law had a significant influence on the formation of the legal culture of Ukrainian society.

The Cossacks gained particular significance during the National Liberation War of the mid-17th century. This period became a turning point in the nation-building process, as for the first time there was a broad unification of various social strata of the population around the idea of creating their own state. Under the leadership of Bohdan Khmelnytsky, a political programme was formulated aimed at achieving autonomy and protecting national interests.

The liberation struggle gave rise to the Hetmanate – a Ukrainian Cossack state that marked a significant stage in the development of national statehood. It possessed a well-developed administrative system comprising the hetman, the general officers, and regimental and company-level administrations. This structure ensured the effective governance of the territory and contributed to the strengthening of state institutions (Tilly, 1990).

The Hetmanate's financial system was also quite developed: there were taxes, customs duties, and its own economic system. This attests to a high level of organisation of state life and economic independence.

The legal system of the Hetmanate combined elements of customary, Lithuanian and Magdeburg law. This contributed to the formation of a multi-tiered legal system that regulated various aspects of social life. Importantly, the law served not only as an instrument of regulation but also of legitimisation of state power.

National consciousness during this period was shaped by several key factors. Firstly, there was the idea of freedom, which was central to Cossack identity. Secondly, there was the struggle for independence, which united different sections of the population. Thirdly, there was the religious factor – Orthodox Christianity, which served as a symbol of the cultural and spiritual unity of the Ukrainian people.

Religion played not only a spiritual but also a political role. The defence of the Orthodox faith was often used as an argument in political struggles, which helped to consolidate the population. The Church served as an important institution that ensured the preservation of cultural traditions and the formation of national identity (Plokhy, 2006).

An important aspect of this stage is the development of education and culture. In the 17th–18th centuries, educational institutions were active, with the Kyiv-Mohyla Academy occupying a special place among them. It became a centre of science, education and spiritual life, contributing to the formation of an intellectual elite that played an important role in nation-building.

Literature, art and folklore also contributed to the formation of national consciousness. Cossack ballads, historical songs and chronicles reflected the struggle for freedom and preserved the memory of important historical events.

Foreign policy factors had a significant impact on the development of the Ukrainian nation. Ukrainian lands lay within the spheres of influence of various states – the Polish–Lithuanian Commonwealth, the Tsardom of Moscow, and the Ottoman Empire. This created difficult conditions for state-building, but at the same time fostered the development of political consciousness and the aspiration for independence (Subtelny, 1986).

The gradual curtailment of the Hetmanate's autonomy by the Russian Empire and its dissolution in the 18th century led to the loss of political independence. Hetman rule was abolished, the Zaporizhian Sich was dissolved, and Ukrainian lands were integrated into the imperial administrative system (Kohut, 1988).

However, even under these conditions, the Cossack tradition did not disappear. It was preserved in cultural memory, folk art, historical works and the consciousness of the population. It was this tradition that became a key factor in the national revival of the 19th century.

Thus, the Cossack-Hetman period is pivotal in the formation of the Ukrainian nation, as it was during this period that political consciousness took shape, state institutions developed, and the idea of independence took root. This period laid the foundations for the key elements of national identity, which became the bedrock for the further development of the Ukrainian nation in subsequent historical periods.

The Modern Period (19th – early 20th centuries)

The modern period of the formation of the Ukrainian nation, spanning the 19th to the early 20th centuries, is a defining phase in the transition from a traditional ethno-cultural community to a modern nation of the European type. It was during this time that the national idea took shape, political consciousness developed, and institutions were established, laying the foundations for future statehood.

This period was characterised by complex historical conditions, as Ukrainian lands were divided between two empires – the Russian and Austro-Hungarian. This division significantly influenced the development of the Ukrainian national movement, leading to its heterogeneity, but at the same time contributed to the formation of various models of nation-building.

One of the key factors of the modern stage was the national revival, which began in the late 18th and early 19th centuries. It was linked to the activities of the intelligentsia, which played a leading role in the formation of national consciousness. Representatives of the Ukrainian cultural elite

contributed to the development of literature, science, education and the arts, which became the foundation for the consolidation of the nation (Hrytsak, 1996).The development of the Ukrainian language played a key role in this process. It became not only a means of communication but also an important symbol of national identity. Despite restrictions and bans, particularly from the Russian authorities, the Ukrainian language was actively used in literature, folklore and public life, which contributed to its spread and consolidation.

An important aspect of the modern period is the development of education and science. The establishment of educational institutions, scientific societies and cultural organisations contributed to the formation of an intellectual milieu, which became the foundation for the development of the national movement. Education played a key role in shaping a new generation of Ukrainians with a clear national identity.

During this period, social and political movements developed actively. The first Ukrainian political organisations emerged, advocating ideas of autonomy, federalism, and later full independence. Political activity contributed to the formation of civil society and the development of political culture (Hrytsak, 1996).

An important milestone was the establishment of the Cyril and Methodius Brotherhood, which became one of the first organised centres of the Ukrainian national movement. Its activities were aimed at spreading the ideas of national revival, education and social justice (Pinchuk, 2007).

Cultural processes played a significant role in the formation of national consciousness. Literature, theatre, music and the visual arts became important instruments for spreading the national idea. The works of Ukrainian writers and artists shaped perceptions of the nation's shared past, cultural heritage and future.

Of particular importance is historical memory, which is shaped through research into the past, the writing of historical works and the popularisation of national history. This contributed to Ukrainians' awareness of their distinctiveness and historical continuity.

At the beginning of the 20th century, the national movement entered a new phase – the political one. The events of the 1905 and 1917 revolutions created the conditions for the realisation of the idea of Ukrainian statehood. During this period, the Ukrainian People's Republic, the West Ukrainian People's Republic and other state formations emerged, which became important steps on the path to independence (Magocsi, 2010).

Although these state entities were unable to survive for long, their significance for the formation of the Ukrainian nation is immense. They cemented the idea of statehood, shaped the political elite and laid the foundations for further liberation struggles.

Socio-economic changes also played an important role in the nation-building process. Industrialisation, urbanisation and the development of capitalist relations contributed to the formation of new social groups, which became active participants in the national movement.

External factors, in particular the influence of European ideas of nationalism, democracy and the self-determination of peoples, also contributed to the development of the Ukrainian nation. The Ukrainian national movement was part of pan-European processes that shaped the continent's political development.

Thus, the modern period is decisive in the formation of the Ukrainian nation, as it is during this period that it emerges as a political community with a distinct national identity. The development of culture, education, politics and ideology created the preconditions for the emergence of an independent Ukrainian state and determined the further direction of national development.

The analysis demonstrates that the genesis of the Ukrainian nation is a holistic and continuous process that underwent a transformation from early historical proto-national structures to a modern political community. It has been demonstrated that each stage of nation-building was driven by the synergy of political institutions, legal norms, cultural heritage and socio-economic factors. It was pre-

cisely this multi-layered interaction that ensured the continuity of the formation of national identity, even in the face of a prolonged absence of statehood.

One of the key theoretical approaches to understanding the nation is the concept whereby the nation is viewed as an imagined political community shaped by a shared history, culture and symbols. This approach helps to explain why the nation is not exclusively an ethnic phenomenon, but rather the result of historical development and social interaction.

Nation-building in Ukraine has its own specific characteristics, stemming from a prolonged absence of statehood and its history as part of various empires. This led to the fragmentation of the political landscape, yet simultaneously contributed to the formation of a resilient cultural identity, preserved through language, traditions and historical memory.

Culture is a key factor in nation-building, serving as a vehicle for values, norms and traditions. Ukrainian culture – in particular folklore, literature, art and religion – has played a decisive role in preserving national identity in the face of external pressure.

The political factor is also of significant importance. The formation of a political nation occurs through the development of state institutions, citizens' participation in political life and an awareness of shared interests. In this context, the Cossack state, liberation movements and modern state-building processes have played a special role.

The legal aspect of nation-building lies in the formation of a system of norms and institutions that regulate social relations and ensure the functioning of the state. The development of the law contributes to the strengthening of statehood, the formation of civic identity, and the safeguarding of human rights and freedoms.

Socio-economic factors also influence the process of nation-building. Economic development, urbanisation, the emergence of a middle class and the social structure of society contribute to the integration of the population and the strengthening of national unity.

Historical memory plays a special role, ensuring continuity between generations and shaping perceptions of a shared past. It is an important element of national identity, as it unites society around shared values and symbols.

External factors, in particular the influence of other states, international relations and globalisation processes, also have a significant impact on nation-building. They can both contribute to the development of the nation and pose challenges to the preservation of its identity.

The current stage of the Ukrainian nation's development is characterised by an active process of social consolidation amidst war, European integration and globalisation. These factors contribute to the strengthening of national identity, the formation of a civic nation and the development of democratic institutions.

Thus, the formation of the Ukrainian nation is a complex and multifaceted process influenced by various factors and historical conditions. An analysis of these processes allows for a deeper understanding of the current state of Ukrainian society and helps to identify the prospects for its future development.

The study has established that the formation of the Ukrainian nation is a protracted, multi-level and non-linear process that has undergone a series of historical transformations. Its development has not been continuous; however, each historical stage has created new preconditions for the further strengthening of national identity.

It was found that the early historical and Old Rus' periods laid the foundations for the ethnocultural community upon which the Ukrainian nation was formed. It was during this time that the basic elements of identity took shape: language, traditions, religious beliefs and the first forms of political organisation.

The study has shown that Kievan Rus' played the role of a civilisational centre, ensuring the integration of the East Slavic lands into the European cultural space. This contributed to the formation of a shared historical memory, which became one of the key factors in nation-building.

It has been established that the Cossack-Hetman period proved decisive in the transition from ethnic community to political nation. It was during this period that the idea of statehood took shape, institutions of self-government developed, and traditions of political participation among the population became established.

It is particularly significant that the Cossack model of society contributed to the development of democratic elements within political culture, notably the election of officials and collective decision-making. This was a unique phenomenon in Eastern Europe at the time.

It has been demonstrated that the modern period (19th – early 20th centuries) marked the formation of the Ukrainian nation as a European-style political community. During this time, there was active development of the national movement, the emergence of the intelligentsia, and the spread of ideas of state independence.

A significant outcome is that culture, education and language became the primary instruments of nation-building. Literature, the press and civil society organisations played a key role in shaping national consciousness and consolidating society.

Furthermore, the study revealed that nation-building processes in Ukraine have always been influenced by external factors – imperial systems, geopolitical conflicts and European ideas of nationalism. This shaped a specific model of Ukrainian development, combining elements of the struggle for independence and cultural self-preservation.

In the current climate, the outcomes of historical development are reflected in the strengthening of national identity, the growth of civic consciousness, and the consolidation of society in the face of external threats and globalisation.

Thus, the findings of the study confirm that the Ukrainian nation has emerged as a complex historical phenomenon, having undergone a long evolutionary journey from an ethnic community to a modern political nation.

Conclusion. The present study leads to the conclusion that the formation of the Ukrainian nation is a protracted and complex historical process encompassing several key stages: the early historical (Old Rus'), the Cossack-Hetman, and the modern (19th – early 20th centuries). Each of these stages had its own specific characteristics, but together they formed a coherent trajectory of the development of Ukrainian national identity.

It has been established that the initial stages of development were linked to the formation of the ethno-cultural foundations of the Ukrainian people, the development of language, traditions, religion and the first political institutions. Kievan Rus' became an important civilisational foundation, laying the groundwork for further national evolution.

The Cossack-Hetman period played a decisive role in the formation of Ukrainians' political consciousness, the development of ideas of statehood, and the emergence of elements of self-government. It was during this period that traditions of political participation took shape, becoming an important component of national identity.

The modern phase facilitated the transition to a contemporary European-style nation-state model. The development of education, culture, literature and political movements contributed to the formation of national consciousness and the idea of independence, which was subsequently realised in the nation-building processes of the early 20th century.

The study also showed that nation-building in Ukraine has always been influenced by external factors, in particular imperial systems, geopolitical challenges and European intellectual currents. At the same time, internal factors – culture, language, historical memory and religion – remained decisive in preserving national identity.

The current stage in the development of the Ukrainian nation is characterised by greater social cohesion, a rise in civic consciousness and an active process of European integration. This confirms that the historical experience of nation-building continues to play a significant role in shaping modern Ukrainian statehood.

Thus, the Ukrainian nation is the result of centuries of historical development, underpinned by a combination of cultural continuity, political struggle and social transformation. The nation's further development depends on society's ability to preserve its own identity whilst integrating into the European and global spheres.

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DOI https://doi.org/10.30525/2592-8813-2026-2-3

STATE SUPPORT FOR MANAGEMENT IN INTEGRATING UKRAINIAN DAIRY ENTERPRISES INTO GLOBAL VALUE CHAINS

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Abstract. The article examines the features of state support for the management of dairy industry enterprises in Ukraine in the context of their integration into global value chains. It is determined that the industry predominantly operates at the lower levels of global production networks, which limits the creation of high added value and reduces its competitiveness on international markets. Institutional, managerial, and economic factors influencing the development of the dairy sector are analyzed, along with the role of state policy in stimulating its modernization. The study reveals that the effectiveness of state support depends on its targeting, alignment with enterprise needs, and orientation toward innovative development. The necessity of transitioning to deep processing of dairy products, digitalization of management, and strengthening cooperative links among producers is substantiated. It is proven that comprehensive modernization of the industry is a key prerequisite for its integration into global value chains.

Key words: dairy industry, state support, management, global value chains, agricultural policy, competitiveness, innovation, integration.

Introduction. The current development of the global economy is characterised by the deepening of integration processes, which manifest themselves in the formation of global value chains (GVCs). In this context, the competitiveness of national industries increasingly depends not only on domestic production efficiency but also on the ability to integrate into international production and logistics systems, ensuring a stable contribution to the creation of the final value of products (World Trade Organization et al., 2023).

Ukraine's dairy sector is one of the strategically important sectors of the agro-industrial complex, possessing significant export potential and socio-economic importance for the development of rural areas. At the same time, it remains vulnerable to structural imbalances, insufficient technological modernisation and limited integration into global production networks. This significantly weakens its competitive position in international markets and limits the potential for generating high added value within the country.

In the current climate, the issue of state support for the management of dairy enterprises is of particular relevance, as it is effective management decisions, backed by state regulatory instruments, that can ensure the transition from a raw material-based export model to an innovation-oriented development model. In this context, state policy acts not only as a mechanism for financial support but also as an institutional driver of the sector's structural transformation.

The relevance of this research is further heightened by global challenges, including changes in international trade, stricter requirements regarding the quality and safety of food products, and increasing competition in the dairy market. In such conditions, the integration of Ukrainian enterprises into global value chains requires a comprehensive scientific rationale and a rethinking of the state's role in shaping a competitive environment.

Research into state support for the management of dairy enterprises in the context of their integration into global value chains is timely and has significant theoretical and practical importance for ensuring the sustainable development of Ukraine's agro-industrial sector.

Main text. The issue of integrating agro-industrial enterprises into global value chains is the subject of active academic discourse in both domestic and international economic literature. In the works of Ukrainian researchers, the emphasis is largely placed on the structural problems of the agricultural sector, the effectiveness of state support, and the need to enhance the competitiveness of enterprises through the modernisation of management approaches (Porter, 1990). At the same time, international studies pay significant attention to the role of the institutional environment, innovation management and transnational production networks in the formation of value added (Gereffi & Fernandez-Stark, 2016).

Despite a significant body of academic research, the comprehensive impact of state support specifically on the management mechanisms for integrating Ukraine's dairy sector into global value chains remains under-researched. Most existing studies focus either on the macroeconomic level of state policy or on the micro-level functioning of individual enterprises, whilst a systematic approach to the interaction between the state, management and international integration remains fragmented.

The issue of aligning state support programmes for the agricultural sector with the actual needs of dairy enterprises also warrants separate attention. In many cases, there is a disconnect between the strategic objectives of state policy and practical management decisions at the enterprise level, which hinders their effective integration into global production networks.

An analysis of the academic literature indicates the existence of theoretical work in the field of agricultural development and international integration; however, further in-depth research is required specifically into the mechanisms of state support for management as a key factor in the integration of Ukraine's dairy industry into global value chains.

The subject of the study is the functioning and development of enterprises in Ukraine's dairy sector in the context of globalisation and intensifying international competition.

The subject of this study is the mechanisms of state support for the management of enterprises in the dairy sector, as well as their impact on the processes of integration into global value chains.

The scientific novelty of the study lies in the deepening of theoretical and methodological approaches to understanding the role of state support as a systemic instrument of influence on the management processes of enterprises in the dairy industry, ensuring their inclusion in international production and logistics value chains.

Furthermore, the interrelationship between state regulatory mechanisms, the effectiveness of enterprise management and the level of their competitiveness in global markets is clarified, enabling the formation of a more comprehensive vision of the institutional framework for the sector's development.

The practical significance of the research findings lies in their potential application in the formulation of state agricultural policy, as well as in the improvement of strategic management within dairy enterprises, with the aim of enhancing their export potential and integration opportunities.

The aim of the study is to substantiate the theoretical and methodological foundations and to develop practical recommendations for improving state support for the management of enterprises in Ukraine's dairy sector in the context of their integration into global value chains.

To achieve the stated objective, the following research tasks have been identified:

- to summarise theoretical approaches to the concept of global value chains and determine the role of the agricultural sector within them;
- to analyse the current state of development of Ukraine's dairy industry and its potential for integration;
- to examine the instruments of state support for enterprises in the agro-industrial complex;
- to assess the effectiveness of existing mechanisms of state regulation in the dairy industry;
- to identify key managerial factors for enhancing the competitiveness of enterprises within global production networks;
- to develop proposals for improving state support for management to strengthen the integration of enterprises into global value chains.

The research information base is structured as a multi-level, systematically organised set of sources that enables a comprehensive study of the issue of state support for the management of enterprises in Ukraine's dairy sector in the context of their integration into global value chains. Its structure is based on a combination of statistical, regulatory, analytical and scientific-theoretical materials, which ensures both the empirical reliability and theoretical validity of the study's results.

The key component of the empirical basis is the official statistical data from the State Statistics Service of Ukraine, which covers a wide range of indicators relating to the development of the dairy sector. In particular, data have been used on milk production volumes, the structure of milk production across farms of various ownership types, trends in cattle numbers, the level of milk processing, domestic consumption, and export and import operations. These indicators make it possible to identify long-term trends in the sector's development, determine its structural imbalances and assess its potential for integration into international markets. Based on this data, a quantitative framework is established for further economic analysis and comparisons.

An important part of the information base is constituted by Ukraine's regulatory and legal acts governing the functioning of the agro-industrial complex and defining the instruments of state support for agriculture. These include Ukrainian laws, resolutions of the Cabinet of Ministers, sectoral strategies and state programmes for the development of the agricultural sector. They shape the institutional environment within which dairy enterprises operate, and define the mechanisms for subsidies, credit support, tax regulation and the stimulation of investment activity. Analysis of these documents allows for an assessment of the extent to which state policy aligns with the actual needs of enterprises.

Analytical reports from international organisations such as the FAO, the OECD, the World Bank and the European Commission also play a significant role. These reports provide comprehensive overviews of global agri-food markets, trends in international trade, the transformation of global value chains, and shifts in countries' competitive positions within the global economy. The use of these sources allows for a comparison of the national characteristics of the development of Ukraine's dairy sector with global processes, as well as the identification of its place within the international economic system. This enables comparative analysis and the identification of potential avenues for integration.

A separate section of the information base consists of academic works by Ukrainian and foreign scholars devoted to issues of agricultural management, state regulation of the economy, innovative enterprise development, and the functioning of global production networks. These works examine the theoretical foundations of value creation, mechanisms of international cooperation, the role of the institutional environment in the development of the agricultural sector, and the characteristics of managerial decisions within transnational value chains. Their use ensures the depth of theoretical analysis and enables the formulation of scientifically sound approaches to the problem under investigation.

The compiled information base combines macroeconomic statistics, regulatory and legal sources, international analytical materials and scientific research, which together ensure the comprehensiveness, interdisciplinary nature and high reliability of the study. This creates the necessary conditions for the further application of modern methods of economic analysis and the formulation of well-founded conclusions regarding the integration of enterprises in Ukraine's dairy sector into global value chains.

The methodological basis of the study is formed on the basis of a combination of general scientific, economic-analytical and specialised methods, which ensure a systematic approach to the study of state support for the management of enterprises in Ukraine's dairy industry and their integration into global value chains.

The core methodological approach is systems analysis, which allows the dairy industry to be viewed as a complex, multi-level system operating in interaction with state institutions, the domestic market and international production networks. This approach provides a holistic understanding of the interrelationships between management decisions, state regulation and the competitiveness of enterprises.

To assess the current state of the sector and identify key development trends, methods of economic and statistical analysis were applied, in particular comparison, generalisation, grouping and time series analysis. They enabled an examination of changes in dairy production volumes, market structure, raw material processing levels and the sector's export potential.

The study employed a comparative method, which allowed for a comparison of Ukrainian practices regarding state support for the agricultural sector with international experience from EU countries and other leading agricultural economies. This enabled the identification of effective instruments of state regulation that facilitate the successful integration of enterprises into global value chains.

A key role is played by the structural-functional approach, which was applied to analyse the interaction between the elements of the state support system, the management mechanisms of enterprises, and the results of their foreign economic activity. This approach enables the functional role of each element to be determined in the process of forming competitive advantages for enterprises in the dairy sector.

Additionally, the method of logical generalisation and synthesis was employed, which facilitated the formulation of generalised conclusions regarding the effectiveness of state policy and the identification of directions for its improvement. This made it possible to move from empirical observations to conceptual recommendations.

Thus, the set of methods applied ensures a comprehensive analysis of the subject under study, allows for the integration of theoretical and practical aspects, and creates a reliable foundation for the formulation of well-founded scientific results.

The analysis shows that Ukraine's dairy sector is operating amid a complex structural transformation, driven by the combined impact of domestic economic imbalances and external integration challenges. Within global value chains, Ukrainian enterprises predominantly occupy lower tiers, focusing on the supply of raw materials or products with a low level of processing, which limits opportunities for generating high added value (FAO, 2024).

Statistical data indicate a long-term trend of declining industrial milk production, alongside the dominance of private households in the structure of primary production. Such a structure is less effective in terms of integration into global markets, as it hinders product standardisation, quality improvement and the assurance of stable supply volumes (OECD, 2024).

A significant problem is the insufficient level of technological modernisation of enterprises in the dairy sector, which directly affects their competitiveness. Limited access to innovative technologies for the processing and storage of dairy products reduces opportunities to participate in high-tech segments of global value chains, where quality, safety and the depth of product processing play a key role (European Commission, 2023).

It should be noted that integration processes in Ukraine's dairy sector are largely dependent on the external economic environment and the requirements of international markets. Increased standards for quality, certification and product traceability imposed by the EU and other trading partners create additional barriers for small and medium-sized producers who lack sufficient resources to adapt to these requirements (World Trade Organization et al., 2023).

The research findings indicate that the current state of Ukraine's dairy sector is characterised by limited integration into global value chains, a low level of processing and structural imbalances in production. This highlights the need to strengthen the role of state support and improve management mechanisms at the enterprise level to facilitate the transition to higher segments of international production networks.

The results of the analysis indicate that the level of integration of enterprises in Ukraine's dairy sector into global value chains is largely determined by the quality of the institutional environment and the effectiveness of management decisions at the enterprise level. In the current context, government policy performs not only a regulatory but also a stimulatory function, creating the conditions for enhancing the competitiveness of the agricultural sector (OECD, 2024).

An important institutional factor is the alignment of national agricultural policy with international standards, in particular the European Union's requirements regarding product quality, safety and traceability. The existence of such requirements creates both barriers to entry and incentives for Ukrainian producers to modernise their production and management systems (European Commission, 2023). At the same time, the insufficient level of harmonisation of the regulatory framework with European regulations slows down integration processes.

Analysis shows that the quality of management decisions at the enterprise level has a significant impact on the effectiveness of integration. In particular, enterprises with more developed systems of strategic management, digitalisation of production processes and quality control demonstrate a greater capacity for integration into international production networks (FAO, 2024). This confirms the argument that global value chains require not only a resource base but also a high level of managerial competence.

The role of state support as a tool for reducing enterprises' transaction costs deserves special mention. Financial programmes, subsidies and investment incentives contribute to the modernisation of production; however, their effectiveness remains uneven due to limited access by small and medium-sized producers to these mechanisms (FAO, 2024). This creates structural inequality within the sector and reduces its overall integration potential.

The findings of the study confirm that the integration of Ukraine's dairy sector into global value chains depends on the synergy between institutional reforms, state support and improved quality of management decisions at the enterprise level.

The study demonstrates that state support is one of the key instruments for building the competitiveness of enterprises in Ukraine's dairy sector and their integration into global value chains. Its impact is manifested through financial, institutional and infrastructural mechanisms that determine the operating conditions for producers in domestic and foreign markets.

Financial instruments of state support, in particular subsidies, interest rate compensation on loans and programmes for partial compensation of the cost of investment projects, are aimed at modernising production capacities and raising the technological level of enterprises. At the same time, their effectiveness depends on the transparency of resource allocation and accessibility for small and medium-sized producers, who remain the most vulnerable within the sector's structure (OECD, 2024).

The institutional dimension of state support encompasses the development of a regulatory framework, the harmonisation of standards with the requirements of international markets, and the creation of conditions for integration into the European economic area. In this context, the alignment of national agricultural policy with the provisions of the EU's Common Agricultural Policy, which sets out long-term development guidelines for the sector, takes on particular significance (World Trade Organization et al., 2023).

Furthermore, state support serves to stimulate innovative activity among enterprises, particularly in the areas of production digitalisation, the implementation of product traceability systems, and the raising of quality standards. This is critically important for entering high-value-added segments of global value chains, where the main criterion is not production volume but the level of technological and managerial maturity of enterprises (World Trade Organization et al., 2023).

The results of the analysis confirm that effective state support is a systemic factor in the development of Ukraine's dairy sector, as it directly influences the modernisation of production, the enhancement of competitiveness, and the expansion of opportunities for integration into global economic chains.

A comparative analysis of international experience shows that the effective integration of the dairy sector into global value chains in developed countries is based on a combination of government support, a high level of technological modernisation, and well-developed cooperative mechanisms between producers, processing enterprises and export organisations (FAO, 2023).

In European Union countries, the Common Agricultural Policy (CAP) plays a key role, providing stable funding for farms, encouraging the greening of production and supporting innovative approaches to managing the agricultural sector. This enables the creation of high levels of added value in products and ensures their competitiveness in global markets (OECD, 2024).

In the US and Canada, the development of the dairy sector is largely based on a cooperative management model, where farmers are organised into large production and marketing structures. This model allows for effective control of product quality, reduces transaction costs and strengthens market positions internationally (World Trade Organization et al., 2023).

In countries with a high level of agricultural development, significant attention is paid to the digitalisation of production and the implementation of product traceability systems, which is a prerequisite for participation in global value chains. This ensures the transparency of production processes and increases consumer confidence in products (World Trade Organization et al., 2023).

A comparison with Ukrainian practice shows that the main challenges remain the lack of cooperation among producers, limited funding for innovation, and the fragmented nature of state support. As a result, Ukraine largely occupies raw material positions in global value chains, whilst developed countries focus on high-tech and processing segments (Cabinet of Ministers of Ukraine [CMU], 2024).

International experience confirms that the successful integration of the dairy sector into global value chains is only possible with systematic state support, the development of cooperation, and the introduction of innovative management practices.

The prospects for integrating Ukraine's dairy enterprises into global value chains are determined by the need to transition from a raw material-based development model to one with a high share of processing and value creation within the country. Such a transition requires the simultaneous modernisation of production, the improvement of management practices, and the strengthening of the role of state support as a systemic regulator of sectoral transformations (World Trade Organization et al., 2023).

One of the key areas is the development of deep processing of dairy products, which allows for an increase in the share of high-value-added products within the export structure. In developed economies, it is the processing segment that generates the bulk of revenue within dairy value chains, whilst primary production serves primarily as a source of raw materials (World Trade Organization et al., 2023).

An important area for future development is the digitalisation of agricultural management, in particular the introduction of monitoring systems, the automation of production processes and digital product traceability. This increases the transparency of supply chains and enables Ukrainian enterprises to meet the quality and safety requirements of international markets.

A key role is played by strengthening cooperation between dairy raw material producers and processing enterprises, which helps to reduce sector fragmentation, improve supply stability and strengthen bargaining positions in external markets. This approach is widely used in countries with a developed agricultural sector and has proven highly effective in the context of global competition (European Commission, 2023).

Furthermore, it is necessary to improve public policy by targeting support more effectively, expanding access for small and medium-sized producers to financial instruments, and encouraging investment in technological modernisation. This will help reduce structural imbalances and ensure more balanced development of the sector.

The prospects for the development of Ukraine's dairy sector are directly linked to the comprehensive modernisation of production, the digitalisation of management and the enhancement of the effectiveness of state support, which together create the conditions for its full integration into global value chains.

Conclusions. The study found that Ukraine's dairy sector is operating in a context of structural transformation, driven by the combined influence of domestic economic imbalances and global integration processes. Enterprises in the sector predominantly occupy lower tiers in global value chains, which limits the potential for generating high added value within the country.

The analysis showed that the key constraints on the sector's development are an insufficient level of technological modernisation, a fragmented production structure, and limited access to effective state support instruments for small and medium-sized producers. This leads to exports remaining raw material-oriented and a low level of integration into the high-tech segments of global markets.

It has been established that state support plays a pivotal role in ensuring the sector's development; however, its effectiveness remains uneven due to a lack of targeting and limited alignment with the actual needs of enterprises. The most effective mechanisms are those aimed at modernising production, stimulating innovation and supporting investment activity.

A comparative analysis of international experience has shown that the successful integration of the dairy sector into global value chains is based on a combination of effective state policy, well-developed producer cooperation and a high level of technological development. In the EU and North America, these factors facilitate the transition to the production of high value-added products.

The prospects for the development of Ukraine's dairy sector are linked to the transition to an innovation-oriented development model, the digitalisation of management, the expansion of product processing, and the improvement of state support mechanisms. The implementation of these measures creates the conditions for enhancing the sector's competitiveness and its integration into global economic processes.

Thus, the study confirms that improving the effectiveness of state support for the management of dairy industry enterprises is a key factor in their successful integration into global value chains and in ensuring the sustainable development of Ukraine's agricultural sector.

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DOI https://doi.org/10.30525/2592-8813-2026-2-4

ACTIVITIES OF THE SECURITY SERVICE OF UKRAINE IN THE ADMINISTRATIVE AND POLITICAL SPHERE

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Abstract. It has been established that the Security Service of Ukraine (hereinafter referred to as the SBU) is one of the key institutions of the state administration system, designed to ensure national security, protect the constitutional order, sovereignty and territorial integrity of the state. It is substantiated that in the conditions of the full-scale armed invasion of the Russian Federation, which began on February 24, 2022, the role of the SBU in the administrative and political sphere has acquired special, extremely important significance. It has been found that the administrative and political sphere includes several subsystems: the sphere of state security, the sphere of public order protection, the sphere of defense, the sphere of foreign affairs and the sphere of justice. The SBU functions primarily in the subsystem of state security, although its activities also affect other subsystems, which is due to the complex nature of threats to national security, which cannot be neutralized without the coordinated efforts of all law enforcement and security structures.

It is proven that the SBU performs tasks to counter intelligence and subversive activities of foreign special services, fights terrorism, ensures information security and protects state interests, directly determines the effectiveness of the entire system of public administration in crisis conditions. Emphasis is placed on the fact that the issues of the administrative and legal status of the SBU and its role in the system of public administration were studied by such scientists as S.M. Berezhnoy, M.M. Karpenko, O.P. Ugrovetsky and others. It is concluded that, at the same time, in conditions of martial law, fundamentally new challenges arise for the functioning of the SBU in the administrative and political sphere, which necessitates the need for an up-to-date scientific analysis.

Key words: law enforcement agency, martial law, protection of sovereignty, Ukraine.

Introduction. The legal basis of the administrative and political sphere in Ukraine is the Constitution of Ukraine, the Law of Ukraine "On the Security Service of Ukraine", the Law of Ukraine "On Combating Terrorism", the Law of Ukraine "On Media" and other legislative acts. The Law of Ukraine "On Media" of 2022 is an example of expanding legal regulation in the administrative and political sphere in accordance with the new realities of information confrontation.

The further development of the administrative and political sphere of public administration in Ukraine is directly related to the transformation of the nature of threats to national security, which have become complex, hybrid and transnational. In modern conditions, the issues of information security, cyber protection, countering disinformation and ensuring the resilience of state institutions

to external influence are of particular importance. In this regard, the administrative and political sphere increasingly integrates new areas of public administration, which were previously considered auxiliary or derivative. This necessitates the revision of traditional approaches to the division of powers between state authorities and the improvement of mechanisms for coordinating their activities.

An important aspect of the functioning of the administrative and political sphere is the institutional structure of bodies that ensure the implementation of the relevant functions. Such bodies include, in particular, the Security Service of Ukraine, the National Police of Ukraine, the Armed Forces of Ukraine, prosecutor's offices, courts, the State Border Service of Ukraine, as well as other entities vested with special powers in the field of security and law and order. Each of these bodies performs specific tasks, but their activities must be coordinated, which is ensured through a system of interagency cooperation and centralized management. A special role in this is played by strategic-level bodies that determine the main directions of state policy in the field of national security and exercise general management of the relevant processes.

Research material and methods. The purpose of this work is a comprehensive analysis of the role and significance of the Security Service of Ukraine in the administrative-political sphere of state administration, identifying problems and prospects for improving its activities in wartime conditions.

Achieving the set goal involves solving the following tasks:

– to investigate the concept and legal nature of the administrative-political sphere of state administration;

– to characterize the administrative-legal status of the SBU and its place in the system of state administration entities;

– to analyze the main functions of the SBU in the administrative-political sphere;

– to reveal the forms and methods of the SBU's activities in the administrative-political sphere;

– to investigate the interaction of the SBU with other state authorities;

– to identify problems and prospects for improving the SBU's activities in martial law conditions.

The methodological basis of the work is a system of general scientific and special-legal methods. The dialectical method was used to examine the activities of the SBU in development and their relationship with other phenomena. The system-structural method made it possible to investigate the place of the SBU in the system of state authorities. The formal-legal method was used in the analysis of regulatory acts regulating the activities of the SBU.

Results and their discussion. One of the key characteristics of the administrative-political sphere is the use of power-managerial methods of regulation. Unlike the economic or social spheres, where dispositive mechanisms play a significant role, in the sphere of state security and law and order is dominated by an imperative approach. This is manifested in the possibility of applying administrative coercion measures, restricting the rights and freedoms of citizens in cases specified by law, as well as in the establishment of special regimes, such as a state of emergency or martial law. At the same time, the application of such measures should be carried out exclusively within the framework of the law and in compliance with the principle of proportionality, which is a necessary condition for ensuring a balance between public interests and human rights.

An essential element of the administrative and political sphere is the regulatory and legal support for the activities of its subjects. Legislation in this area is characterized by a high level of detail and specialization, which is due to the complexity and diversity of relevant social relations. At the same time, an important trend is the harmonization of national legislation with international standards, in particular in the field of human rights, the fight against terrorism, cybersecurity and information protection. Ukraine, as a state integrating into the European legal space, is actively implementing the provisions of international treaties and recommendations, which contributes to increasing the efficiency of the functioning of the administrative and political sphere.

At the same time, the effectiveness of the administrative and political sphere largely depends on the level of interaction between state bodies and society. Modern approaches to public administration involve the active involvement of civil society in the processes of forming and implementing state policy, including in the security sector. This is manifested in the development of mechanisms of public control, transparency of the activities of government bodies, as well as in increasing the level of public trust in state institutions. In this context, the mass media and new media play an important role, acting not only as channels of information, but also as tools for influencing public opinion.

Thus, the administrative and political sphere of public administration in Ukraine is a complex, multi-level system that covers a wide range of social relations related to ensuring state security, law and order and protecting national interests. Its effective functioning requires a combination of strict power mechanisms with compliance with the principles of the rule of law, human rights and freedoms, as well as constant improvement of the institutional and legal foundations of the activities of the relevant state authorities.

The Security Service of Ukraine is a special-purpose state body with law enforcement functions that ensures state security. In accordance with the Law of Ukraine "On the Security Service of Ukraine", the SSU is subordinate to the President of Ukraine and is a central entity in the system of ensuring national security.

The administrative and legal status of the SSU is determined by a set of legal norms that establish its place in the system of state authorities, tasks, functions, powers and organizational structure. The key elements of the administrative and legal status are: the legal basis of activity, competence, organizational structure, procedure for formation and responsibility. According to O.P. Ugrovetsky, it is precisely the clear regulatory consolidation of the status of security agencies that is the key to their effectiveness and legality of their activities.

The SBU system consists of the Central Directorate, regional bodies subordinate to it, military counterintelligence bodies, military formations, as well as educational, scientific and research and other institutions. To organize anti-terrorist operations, the SBU operates the Anti-Terrorist Center, the regulations on which are approved by the President of Ukraine.

The legal basis for the SBU's activities is the Constitution of Ukraine, the Law on the SBU and other legislative acts and relevant international legal instruments acts recognized by Ukraine. The Constitution of Ukraine guarantees the inviolability of the constitutional order and is the basis of the entire system of ensuring state security.

The leading role among subordinate acts is played by decrees of the President of Ukraine, which is due to his constitutional status as the Supreme Commander-in-Chief of the Armed Forces of Ukraine and the Chairman of the National Security and Defense Council of Ukraine. Decrees of the President of Ukraine have a decisive influence on the formation of the administrative and legal status of the SBU, since they approve the Regulations on the Security Service of Ukraine, its organizational structure, number, procedure for appointment and dismissal of management, as well as the basic principles of service and disciplinary liability (Postanova Velykoyi Palaty Verkhovnoho Sudu, 2018; Postanova Verkhovnoho Sudu, 2022).

Article 7 of the Code of Administrative Procedure of Ukraine specifically emphasizes that the court applies international treaties, the consent to which is binding has been granted by the Verkhovna Rada of Ukraine, along with the Constitution and laws. If an international treaty, the binding consent of which has been granted by the Verkhovna Rada of Ukraine, establishes rules other than those established by law, then the rules of the international treaty apply (Kodeks administratyvnoho sudochynstva Ukraini, 2017).

An important feature of the administrative and legal status of the SBU is the principle of non-partisanship: the use of the Service in party, group or personal interests is not allowed, and the activities of parties and movements with political goals in the SBU are expressly prohibited. The activities

of the SBU are based on the principles of legality, respect for the rights and dignity of the individual and responsibility to the people of Ukraine.

S.M. Berezhnoy notes that a feature of the administrative and legal status of the SBU is the combination of intelligence, counterintelligence and law enforcement functions in one body, which distinguishes it from similar services of most states, where these functions are delimited between different departments.

Of particular importance in the activities of the SBU is the counterintelligence function, which is aimed at detecting, preventing and stopping intelligence and subversive activities against Ukraine. In modern conditions, this function is taking on new forms and content, in particular due to the spread of hybrid threats that combine military, information, economic and cyber influences. Accordingly, the SBU is forced to adapt its methods of activity, using modern technologies, analytical tools and interagency interaction. In this case, an important condition is compliance with the law and prevention of excessive interference in the private lives of citizens, which is ensured by the establishment of clear procedural guarantees and control over the activities of the Service.

An equally important component is anti-terrorist activities, which are carried out by the SBU through the Anti-Terrorism Center. This body coordinates the activities of other entities fighting terrorism, ensures the planning and conduct of anti-terrorist operations, and also analyzes and forecasts terrorist threats. In the context of armed aggression against Ukraine, the role of the Anti-Terrorism Center has significantly increased, since terrorist methods are used as a tool for waging hybrid warfare. This requires the SBU not only to respond promptly to specific threats, but also to form a comprehensive system for preventing terrorism.

The counterintelligence activities of the Security Service of Ukraine are systemic and multi-level in nature, since they are aimed not only at directly detecting and stopping the activities of foreign special services, but also at preventing potential threats at the early stages of their formation. In modern conditions, this function includes countering not only classical forms of espionage, but also information and psychological operations, cyber intelligence, economic and technological influence. Of particular importance is counterintelligence support of critical infrastructure, energy facilities, transport, communications, as well as enterprises of the defense-industrial complex, since these areas are priority targets for foreign influence. In addition, counterintelligence measures are actively used in the field of international relations, in particular to protect the activities of diplomatic missions of Ukraine abroad and neutralize attempts of external interference in the internal affairs of the state.

The anti-terrorist function of the Security Service of Ukraine is characterized by its complexity and coordination, since the SBU not only directly carries out measures to counter terrorism, but also ensures coordination of the activities of other entities in this area. In accordance with the Law of Ukraine "On Combating Terrorism", the Service is entrusted with a key role in planning and conducting anti-terrorist operations, as well as in determining the main directions of state policy in this area. In modern conditions, anti-terrorist activities are closely intertwined with issues of national defense, since terrorist methods are actively used within the framework of hybrid threats. This necessitates the continuous improvement of the mechanisms of interaction between the SBU, the Armed Forces of Ukraine, the National Police and other security and defense sector bodies. An important component of this activity is also the prevention of terrorist threats, which includes the identification of radicalized individuals, prevention of terrorist financing and information counteraction to extremist propaganda.

The implementation of pre-trial investigation of criminal offenses in the field of state security is one of the key law enforcement functions of the Security Service of Ukraine. It is implemented through the activities of investigative units authorized to investigate crimes against the foundations of national security, terrorist crimes, as well as other offenses classified as under the jurisdiction of the SBU. Criminal Procedure Code of Ukraine establishes the procedural framework for such activities, ensuring guarantees of observance of human rights and freedoms. At the same time, the specificity

of this function lies in the close combination of operational-search and procedural measures, which allows for the effective detection and documentation of criminal activity. In practical terms, this includes conducting covert investigative (search) actions, collecting evidence, interacting with prosecutors and courts, as well as participating in international cooperation on criminal prosecution issues.

The information and analytical activities of the Security Service of Ukraine are an important tool for ensuring the effectiveness of state administration in the field of national security. It consists in collecting, processing, analyzing and summarizing information that is important for making managerial decisions by state authorities. The results of such activities are used to form state policy, forecast the development of the security situation and determine priorities in the field of defense and security. The public report of the SBU for 2022 indicates a significant amount of analytical work carried out in conditions of armed aggression, in particular, on assessing the risks associated with the activities of enemy structures and developing countermeasures. In the modern world, where information plays a key role, it is the analytical component that becomes one of the determining factors in the effectiveness of the activities of security agencies.

Thus, the functional workload of the Security Service of Ukraine covers a wide range of areas, each of which has independent significance, but at the same time is closely interconnected with others. Counterintelligence, the fight against terrorism, the protection of state secrets, pre-trial investigation, the protection of sovereignty and analytical support form a single system of activities aimed at ensuring national security. It is this multi-vector nature that allows the SBU to effectively respond to In wartime, the interaction of the SBU with the Armed Forces of Ukraine has become extremely important. The military counterintelligence bodies of the SBU provide counterintelligence support to the Armed Forces and other military formations, detect enemy agents and record attempts by foreign special services to influence combat management. This is, in particular, the joint work of the SBU and the Armed Forces of Ukraine during the identification of enemy artillery fire adjusters.

Thus, the system of interaction of the SBU with other state authorities is complex and multi-level. The effectiveness of such interaction directly determines the state's ability to respond to threats to national security and ensure the stable functioning of all public administration institutions.

The introduction of martial law in Ukraine significantly affected the conditions for the functioning of the SBU, posing fundamentally new challenges to the Service and at the same time granting it additional powers. Decree of the President of Ukraine dated 02/24/2022 No. 64/2022 placed on law enforcement and security agencies, including the SBU, a special responsibility for protecting the state in conditions of armed conflict. Under such conditions, the activities of the Service have acquired a maximum mobilization nature, which is manifested in the transition to a regime of increased readiness, concentration of resources in priority areas, and increased coordination with other bodies of the security and defense sector. At the same time, the need for rapid adoption of management decisions has increased, which leads to increased requirements for the effectiveness of the organizational and legal mechanisms of the SBU's activities. The extremely high intensity of threats faced by the Service leads to a significant increase in the load on all its units. The number of criminal proceedings investigated by the SBU has increased sharply: in the first two years of active hostilities alone, the SBU detained more than two thousand traitors and about five thousand collaborators. Such a volume of operational and service work requires not only a quantitative expansion of the staff, but also an increase in the level of professional training of employees, their specialization and ability to operate in conditions of increased risk. In addition, a significant load on investigative and operational units requires improving internal management procedures, optimizing resource allocation and introducing modern information systems that allow for the effective processing of large volumes of data.

A significant challenge is the aggravation of cyber threats, which have become systemic and have become one of the key tools for conducting hybrid warfare. The enemy is actively using cyber attacks on Ukraine's critical infrastructure, in particular, making attempts to penetrate the electronic systems

for planning operations of the Armed Forces, and the management systems of energy, transport and communications facilities. In these conditions, the SBU is forced not only to respond to cyber attacks that have already been committed, but also to take preventive measures aimed at preventing them. This involves constant updating of the technical base, the introduction of modern cyber defense tools, as well as the involvement of highly qualified specialists in the field of information technologies. At the same time, there is a need to develop international cooperation in the field of cybersecurity, since a significant part of the threats are of a cross-border nature.

The changing nature of threats also necessitates the expansion of the legal tools of the SBU. In 2022, the Service was granted powers in the field of preventing and stopping crimes of technological and chemical terrorism. This trend indicates the flexibility of the legislator in responding to new challenges, but at the same time raises the question of ensuring a balance between expanding powers and respecting human rights. The effective functioning of the SBU in conditions of martial law requires not only the provision of additional tools, but also a clear regulatory definition of the limits of their application, which allows prevent possible abuses and ensure the legitimacy of the Service's activities.

No less important is the issue of building the institutional capacity of the SBU, which includes both organizational and logistical aspects. Official materials of the Service indicate comprehensive work in this area, in particular by attracting foreign assistance, modernizing technical means, improving the personnel training system and introducing the latest technologies. In modern conditions, the institutional capacity of the SBU is determined not only by the number of resources, but also by the ability to use them effectively, quickly adapt to changes and ensure a high level of coordination between units. An important area is also the development of the analytical component of activity, which allows for timely identification of potential threats and the formation of strategic approaches to their neutralization.

A positive trend is the growth of the level of public trust in the Security Service of Ukraine. According to sociological research, the level of trust in the SBU increased by 34% during 2022, which indicates a high assessment of the effectiveness of its activities by citizens. Such trust is an important resource for the Service, as it contributes to increasing the effectiveness of its work, in particular through active interaction with the population, obtaining information about potential threats and supporting state security policy. At the same time, maintaining and further strengthening this trust requires adherence to the principles of openness, accountability and legality in the activities of the SBU.

The prospects for improving the activities of the Security Service of Ukraine under martial law are directly related to the continuation of institutional reforms aimed at increasing efficiency and compliance with Euro-Atlantic standards. One of the key areas is the further separation of the functions of the SBU and other law enforcement agencies, which will allow the Service to focus on its main purpose - ensuring state security. It is also important to increase technological potential, in particular in the field of cybersecurity and intelligence, which will ensure more effective counteraction to modern threats. Expanding international cooperation with NATO and EU member states will facilitate the exchange of experience, receipt of technical assistance and integration of Ukraine into the international security system.

In general, the activities of the Security Service of Ukraine in martial law are characterized by a high level of adaptability and the ability to effectively respond to new challenges. Despite the significant workload and complexity of tasks, the SBU demonstrates the ability to perform the functions assigned to it, ensuring the protection of state interests and the safety of citizens. Further development of the Service should be in the direction of strengthening its institutional capacity, improving legal regulation, introducing modern technologies and deepening international cooperation, which will allow increasing the effectiveness of its activities in the administrative and political sphere.

Based on the results of the study of the role and significance of the Security Service of Ukraine in the administrative and political sphere, the following general **conclusions** can be formulated.

1. The administrative and political sphere is a special segment of public and legal relations, covering issues of state security, constitutional order, protection of sovereignty and territorial integrity. The SBU functions primarily in the subsystem of state security, although its activities also affect related areas of public administration. The legal basis of this sphere is constantly developing in accordance with new challenges arising in conditions of armed conflict.

2. The SBU is a special-purpose state body with law enforcement functions, subordinate to the President of Ukraine. Its administrative-legal status is characterized by broad competence in matters of protecting state sovereignty, combating terrorism, counterintelligence and protecting state secrets. The principle of non-partisanship and legality are the key principles of the Service's activities.

3. The functions of the SBU in the administrative-political sphere are diverse and include counterintelligence, anti-terrorist, law enforcement, information-analytical and preventive activities. The list of functions and powers of the SBU is constantly evolving in accordance with new threats to national security.

4. The forms and methods of the SBU's activities in the administrative-political sphere include rule-making, operational-service, criminal-procedural and preventive activities. The Service applies methods of persuasion and administrative coercion exclusively within the limits specified by law. Operational-search and counterintelligence activities are specific tools that distinguish the SBU from other executive authorities.

5. The interaction of the SBU with other state authorities is a complex and multi-level system. The Service closely cooperates with the President, the Cabinet of Ministers, the National Security and Defense Council, law enforcement agencies, the Armed Forces and local authorities. At the international level, the SBU actively cooperates with foreign special services and security services of partner states.

6. The conditions of martial law have posed fundamentally new challenges for the SBU: a sharp increase in the number of criminal proceedings, increased cyber threats, the need for reform and adaptation to new conditions. At the same time, the Service demonstrates the ability to effectively perform its tasks in crisis conditions, which is confirmed by the growth of public trust in it. Prospects for improving the SBU's activities are associated with further institutional reforms, technological renewal and deepening international cooperation.

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DOI https://doi.org/10.30525/2592-8813-2026-2-5

STRATEGIC MANAGEMENT EVALUATION OF U.S. INNOVATION POLICY: OPERATIONALIZING THE LIFEG FRAMEWORK

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Abstract. This study examines U.S. innovation policy through the lens of strategic management by developing and operationalizing the LIFEG Framework (Likhota Innovation Policy Effectiveness and Governance Framework) as an evaluative model for assessing the strategic management coherence of national innovation systems. Existing approaches often analyze innovation policy through isolated indicators, such as public R&D funding, institutional structures, patent activity, or commercialization outcomes, while providing limited tools for evaluating how strategic priorities, governance mechanisms, support instruments, and economic outcomes are managed as an integrated system. The proposed framework integrates five dimensions: institutional governance, public support mechanisms, commercialization capacity, strategic technological priorities, and economic performance. The study applies a mixed-method approach combining theoretical analysis with empirical assessment based on publicly available U.S. and international data, including federal R&D obligations, national R&D expenditures, R&D intensity, patent activity, agency-level strategic concentration, and comparative international innovation indicators. The findings show that the effectiveness of U.S. innovation policy depends not only on the scale of funding or individual policy instruments, but on the quality of strategic management across governance structures, support mechanisms, commercialization processes, technological priorities, and economic outcomes. The article contributes to innovation management and public administration research by introducing an operational framework for evaluating policy coherence within complex national innovation systems.

Key words: strategic management; innovation management; innovation policy; innovation governance; U.S. innovation system; policy evaluation; R&D management; commercialization capacity; technological priorities; economic performance; LIFEG Framework.

Introduction. Strategic management of innovation policy has become one of the central factors shaping technological competitiveness, long-term economic development, and the adaptive capacity of national innovation systems. In advanced economies, innovation is not determined only by market forces or isolated public support instruments; it depends on the ability of institutions to coordinate priorities, allocate resources, support commercialization, and align technological development with broader economic objectives. In this context, the evaluation of U.S. innovation policy should be understood not only as a question of public governance, but also as a problem of strategic innovation management.

The growing complexity of innovation systems has significantly expanded the analytical scope of innovation policy research. Classical economic approaches identify innovation as a major driver of structural transformation and economic growth (Schumpeter, 1934). National innovation systems theory further emphasizes the importance of institutional interaction, knowledge exchange, and systemic learning processes in shaping innovation outcomes (Freeman, 1987; Nelson, 1993; Lundvall, 2010). More recent governance-oriented approaches, including the Triple Helix framework and the entrepreneurial state perspective, highlight the active role of public institutions, universities, industry, and state coordination in technological development (Etzkowitz & Leydesdorff, 2000; Mazzucato, 2013).

Despite these theoretical advances, an important limitation remains within the existing literature. Most approaches explain the structure and functioning of innovation systems, but provide limited operational tools for evaluating innovation policy effectiveness as a multidimensional management and governance outcome. Existing studies frequently examine isolated dimensions of innovation systems, such as public R&D expenditures, institutional structures, patent activity, or commercialization processes, without integrating them into a unified evaluative framework. As a result, innovation policy effectiveness is often assessed through fragmented indicators that fail to capture the systemic interaction between governance, public support, commercialization, strategic direction, and economic performance.

This limitation is particularly significant in the case of the United States. The U.S. innovation system operates through a decentralized and multi-level governance architecture involving federal agencies, research institutions, universities, mission-oriented programs, and private-sector actors. Innovation policy in the United States is not coordinated through a single centralized authority; instead, it emerges through the interaction of differentiated institutional structures, funding mechanisms, strategic technological priorities, and commercialization channels. Consequently, evaluating policy effectiveness requires an analytical model capable of assessing not only individual instruments, but also the coherence of their interaction within the broader innovation management and governance system.

Prior research has demonstrated the importance of state regulation, institutional coordination, and strategic technological support in shaping innovation outcomes in the United States (Likhota, 2025a; Likhota, 2025b; Likhota, 2025c). Additional studies have emphasized the role of intellectual property regulation, commercialization mechanisms, and the relationship between innovation policy and economic development (Likhota, 2025d; Likhota, 2025e). However, existing approaches remain primarily descriptive and do not provide an integrated operational framework for evaluating innovation policy effectiveness across multiple governance and performance dimensions.

To address this gap, this study develops and operationalizes the LIFEG Framework (Likhota Innovation Policy Effectiveness and Governance Framework) as a strategic management and governance-based evaluation model for assessing U.S. innovation policy effectiveness. The framework integrates five analytical dimensions: institutional governance, public support mechanisms, commercialization capacity, strategic technological priorities, and economic performance. Rather than treating innovation policy as a set of isolated instruments, the framework conceptualizes effectiveness as the result of strategic management coherence among institutional, financial, commercialization, technological, and economic components of the innovation system.

The study applies a mixed-method research design combining theoretical analysis with empirical assessment based on publicly available U.S. and international data. The empirical component incorporates indicators related to federal R&D obligations, national R&D expenditures, R&D intensity, patent activity, strategic agency concentration, and comparative international innovation performance. These indicators are used to operationalize the LIFEG Framework as a multidimensional evaluative structure for analyzing innovation policy effectiveness within a complex governance environment.

The central argument of the study is that the effectiveness of U.S. innovation policy is determined not by isolated policy instruments or funding volumes alone, but by the coordinated interaction of governance structures, public support mechanisms, commercialization processes, strategic technological prioritization, and broader economic outcomes. In this respect, the study shifts the analytical focus from descriptive innovation-system analysis toward operational evaluation of strategic innovation-management coherence and performance.

The contribution of the article is threefold. First, it introduces an original strategic management and governance-based framework for evaluating innovation policy effectiveness. Second, it opera-

tionalizes the framework using empirical indicators derived from publicly available institutional and international datasets. Third, it applies the framework to the U.S. innovation system, demonstrating how innovation policy effectiveness can be evaluated through the strategic interaction of institutional coordination, public support, commercialization capacity, technological prioritization, and economic-performance outcomes.

Main text. The theoretical basis of this study is formed by innovation systems theory, governance-oriented approaches to innovation policy, and public administration research. Classical economic theory considers innovation a key driver of economic development and structural transformation (Schumpeter, 1934). The concept of national innovation systems emphasizes institutional interaction, knowledge flows, and learning processes among firms, universities, research organizations, and public authorities (Freeman, 1987; Nelson, 1993; Lundvall, 2010). Governance-oriented approaches, including the Triple Helix model and the entrepreneurial state perspective, further demonstrate the role of public institutions, universities, industry, and state coordination in shaping technological development (Etzkowitz & Leydesdorff, 2000; Mazzucato, 2013).

From the perspective of strategic management, innovation policy can be viewed as a system of coordinated managerial decisions aimed at setting priorities, allocating resources, organizing institutional interaction, supporting commercialization, and monitoring performance outcomes. This interpretation connects innovation governance with management theory, since the effectiveness of national innovation systems depends not only on institutional structure, but also on the quality of strategic coordination, resource management, and adaptive decision-making.

At the same time, these approaches are more effective at explaining the structure and functioning of innovation systems than at evaluating innovation policy effectiveness as a multidimensional management and governance outcome. Existing studies often analyze separate aspects of innovation systems, including public R&D funding, institutional design, patent activity, commercialization, or strategic technological priorities. However, the effectiveness of innovation policy depends not only on these elements separately, but also on the coherence of their interaction within the broader innovation management and governance system.

This limitation is particularly important in the case of the United States, where innovation policy operates through a decentralized and institutionally differentiated architecture involving federal agencies, research institutions, universities, mission-oriented programs, intellectual property mechanisms, and private-sector commercialization. In such a system, policy effectiveness cannot be adequately assessed through one indicator, such as R&D intensity, patent counts, or funding volume alone. A broader evaluative model is required to examine how governance, support mechanisms, commercialization capacity, strategic priorities, and economic outcomes interact.

To address this issue, the study develops the LIFEG Framework (Likhota Innovation Policy Effectiveness and Governance Framework) as a strategic management and governance-based model for evaluating innovation policy effectiveness. The framework integrates five dimensions: institutional governance, public support mechanisms, commercialization capacity, strategic technological priorities, and economic performance. Institutional governance reflects the coordination capacity and functional specialization of public institutions. Public support mechanisms include R&D funding, grants, mission-oriented programs, and other instruments supporting scientific and technological development. Commercialization capacity captures the ability of the system to transform research and technological knowledge into protected and market-relevant outputs. Strategic technological priorities reflect the capacity of public policy to direct resources toward technologically significant domains. Economic performance functions as the outcome-validation layer of the framework.

Conceptually, the evaluative logic of the framework can be represented as follows:

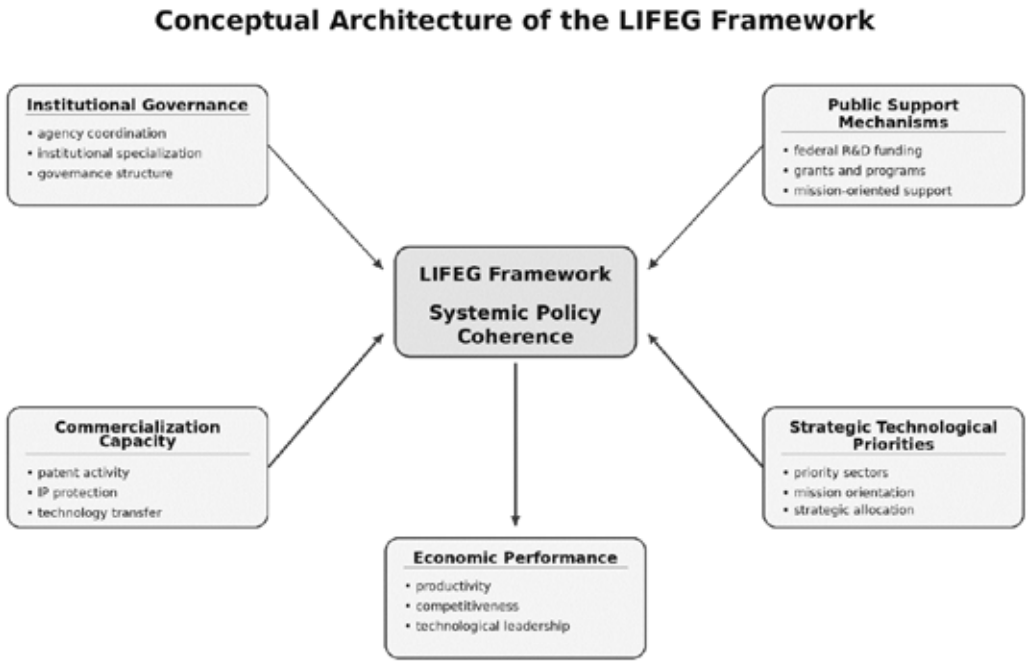
$$\mathbf{IPE = f(G \times S \times C \times T \rightarrow E)}$$

where: **IPE** is Innovation Policy Effectiveness, **G** is Institutional Governance, **S** is Public Support Mechanisms, **C** is Commercialization Capacity, **T** is Strategic Technological Priorities, and **E** is Economic Performance.

The formula does not represent an econometric equation or a weighted composite index. Rather, it illustrates the strategic management logic of the framework, according to which economic performance emerges from the coordinated management of governance structures, support mechanisms, commercialization processes, and technological priorities. The multiplicative logic of the framework emphasizes interdependence: a critical weakness in any major dimension may compromise overall policy effectiveness even when other dimensions demonstrate strong performance.

Diagram 1 presents the conceptual architecture of the LIFEG Framework and illustrates the interaction among its five analytical dimensions.

Diagram 1. LIFEG Framework as a Strategic Management Model for Evaluating U.S. Innovation Policy



Source: developed by the author

The methodological basis of this study is a mixed-method approach combining theoretical analysis, strategic management interpretation, and empirical assessment based on publicly available institutional and statistical data. The study does not construct a weighted econometric index. Instead, it operationalizes the LIFEG Framework as a strategic management evaluation tool for assessing the coherence of U.S. innovation policy across institutional, financial, commercialization, technological, and economic dimensions.

The research logic consists of four stages. First, the theoretical foundations of strategic innovation management, national innovation systems, governance-oriented innovation policy, and public administration are identified. Second, these foundations are integrated into the LIFEG Framework as a five-dimensional model of innovation policy evaluation. Third, each dimension is connected to observable indicators derived from official public datasets. Fourth, the framework is applied to the U.S. innovation system to assess how governance structures, support mechanisms, commercializa-

tion capacity, technological priorities, and economic outcomes interact within a complex national innovation system.

The United States was selected as the empirical case because of the scale, complexity, and global significance of its innovation system. U.S. innovation policy operates through a decentralized architecture involving federal agencies, universities, research institutions, private-sector actors, mission-oriented programs, intellectual property mechanisms, and commercialization channels. This makes the U.S. case suitable for evaluating innovation policy not only as a governance system, but also as a strategic management system that coordinates priorities, resources, institutional roles, and performance outcomes.

The LIFEG Framework is operationalized through five interrelated dimensions: institutional governance, public support mechanisms, commercialization capacity, strategic technological priorities, and economic performance. Institutional governance reflects the coordination capacity and functional specialization of public institutions. Public support mechanisms capture the scale and structure of R&D financing and policy-support instruments. Commercialization capacity evaluates the transformation of research and technological knowledge into protected and market-relevant outputs. Strategic technological priorities reflect the direction of public resources toward technologically significant domains. Economic performance functions as an outcome-validation layer that situates innovation policy within broader macroeconomic and competitiveness-related indicators.

The selection of indicators was based on four criteria: conceptual correspondence with the relevant LIFEG dimension; availability from official or internationally recognized public sources; relevance to the U.S. innovation system; and suitability for evaluating system-level strategic management coherence rather than isolated program-level outcomes. The empirical analysis relies primarily on data from the National Center for Science and Engineering Statistics and the National Science Foundation for R&D expenditures, federal R&D obligations, and R&D portfolio structure (NCSES, 2026a; NCSES, 2026b; National Science Board, 2025), the United States Patent and Trademark Office, the World Intellectual Property Organization, IPO & Harrity Analytics, and PitchBook-NVCA Venture Monitor for patent-related and venture-capital indicators (USPTO, 2024; WIPO, 2025; IPO & Harrity Analytics, 2025; PitchBook & NVCA, 2026), and the National Science Board, OECD, World Bank, and NIST CHIPS for America materials for international comparison, macroeconomic indicators, and strategic industrial-policy signals (National Science Board, 2025; OECD, 2024; World Bank, 2024; NIST, 2026).

Data on national R&D expenditures, R&D intensity, federal R&D obligations, and the distribution of R&D responsibilities across federal agencies are used to assess institutional governance, public support mechanisms, and strategic technological priorities. Patent-related indicators are used to evaluate commercialization capacity as a proxy for technological codification and research-to-market conversion. International R&D comparisons, GERD-to-GDP ratios, and the U.S. share of global R&D expenditures are used to support the economic-performance dimension. These indicators are interpreted as multidimensional evaluation proxies rather than as direct causal measures of macroeconomic performance.

Table 1 summarizes the operationalization logic of the LIFEG Framework and shows how each dimension is connected to empirical indicators, data sources, and strategic management evaluation roles.

Presentation of the main research material. The application of the LIFEG Framework to U.S. innovation policy demonstrates that the effectiveness of a national innovation system is determined not only by the availability of resources, institutions, or separate policy instruments, but by the quality of strategic management across interrelated dimensions. In this study, the U.S. innovation system is assessed through five LIFEG dimensions: institutional governance, public support mechanisms, commercialization capacity, strategic technological priorities, and economic performance. This approach allows innovation policy to be interpreted as a strategic management system in which institutional

Table 1

Operationalization of the LIFEG Framework as a Strategic Management Evaluation Tool

LIFEG Dimension	Operational Meaning	Main Indicators / Evidence	Primary Data Sources	Strategic Management Evaluation Role
Institutional Governance	Structure, coordination capacity, and functional specialization of public institutions involved in innovation policy.	Distribution of federal R&D obligations by agency; concentration of R&D responsibilities among major federal agencies; agency-level functional specialization; role of mission-oriented institutions.	NCSES; NSF Science and Engineering Indicators; federal agency data.	Evaluates whether innovation policy is supported by coordinated institutional management and functionally differentiated governance architecture.
Public Support Mechanisms	Financial and policy instruments that enable scientific research, technological development, and innovation activity.	National R&D expenditures; R&D intensity as a share of GDP; federal R&D obligations; business-funded and federally funded R&D as shares of GDP; federal R&D portfolio structure by type of activity.	NCSES; NSF; National Science Board; OECD Main Science and Technology Indicators.	Assesses how financial and policy-support mechanisms are managed to sustain innovation activity.
Commercia-lization Capacity	Ability of the innovation system to convert research outputs and technological knowledge into protected, transferable, and market-relevant results.	Utility patent grants; patent activity; patents in force; intellectual property protection; venture capital dynamics as a market-financing indicator of commercialization capacity.	USPTO; WIPO; IPO & Harrity Analytics; PitchBook-NVCA Venture Monitor.	Evaluates the management of research-to-market conversion and the transformation of technological activity into protected and economically usable outputs.
Strategic Technological Priorities	Directional capacity of innovation policy to concentrate institutional attention and public resources in technologically significant sectors.	Mission-oriented agency concentration; sectoral orientation of federal R&D obligations; priority domains reflected in defense, health, energy, space, basic science, industrial technology programs, and targeted semiconductor-policy instruments.	NCSES; NSF; National Science Board; NIST CHIPS for America; federal agency budget and program data.	Assesses whether innovation policy provides strategic direction and aligns resources with long-term technological priorities.
Economic Performance	Broader outcome-validation layer reflecting the macroeconomic and competitiveness-related environment associated with innovation policy.	GERD-to-GDP ratio; international GERD comparisons; U.S. share of global R&D expenditures; comparative innovation intensity.	National Science Board; OECD; World Bank; NSF/NCSES international comparison data.	Evaluates whether strategic management of governance, support, commercialization, and technological priorities is associated with strong innovation-performance outcomes.

Source: developed by the author

Note: The indicators are used as multidimensional evaluation proxies rather than as components of a weighted composite index.

coordination, resource allocation, commercialization processes, technological direction, and performance outcomes interact within a single analytical structure.

The empirical evidence confirms that the U.S. innovation system is characterized by a high degree of institutional differentiation and strategic specialization. Federal R&D obligations reached USD 194.2 billion in FY 2024, increasing by 4.4% from FY 2023, while preliminary FY 2025 data indicated a relatively stable level of USD 194.1 billion. The five largest federal agencies in the R&D portfolio – DOD, HHS, DOE, NASA, and NSF – accounted for 93% of federal R&D obligations in FY 2024, equivalent to USD 181.4 billion. DOD accounted for 50%, HHS for 25%, DOE for nearly 9%, NASA for 6%, and NSF for 4% of the federal R&D portfolio (NCSES, 2026b). From the perspective of strategic management, this structure shows that U.S. innovation policy is not managed through a single centralized authority, but through a system of specialized agencies whose missions create differentiated channels of technological development.

Public support mechanisms represent the second important layer of strategic innovation management. U.S. research and experimental development performed in 2023 totaled USD 937 billion, while the estimated total for 2024 increased to USD 993 billion (NCSES, 2026a). R&D intensity remained high, amounting to 3.37% of GDP in 2023 and an estimated 3.39% in 2024. In 2024, business-funded R&D accounted for 2.54% of GDP, while federally funded R&D accounted for 0.63% of GDP (NCSES, 2026a). These indicators show that the U.S. system combines strong private-sector innovation capacity with a stable federal support function. Strategically, this means that government intervention does not replace market mechanisms, but supports them by financing basic research, mission-oriented programs, and areas where private actors may underinvest because of uncertainty, long time horizons, or high technological risk.

Commercialization capacity is a key dimension because innovation policy cannot be considered effective if research activity does not translate into protected, transferable, and economically usable results. Public patent statistics show that the USPTO granted 324,042 patents in 2024, representing a 4% increase compared with 2023 (IPO & Harrity Analytics, 2025). In addition, WIPO data indicate that the United States had approximately 3.5 million patents in force in 2024, the second-largest active patent stock after China (WIPO, 2025). These indicators do not measure the economic value of each invention directly, but they demonstrate the scale of technological codification and the institutional capacity to protect innovation outputs. From a strategic management perspective, commercialization capacity functions as the conversion layer of the LIFEG Framework: it connects R&D investment and institutional support with market-relevant technological results.

Strategic technological priorities are reflected in the mission-oriented structure of federal R&D obligations. The concentration of R&D resources in DOD, HHS, DOE, NASA, and NSF indicates that U.S. innovation policy is managed through sectoral missions associated with defense, health, energy, space, and basic science. This does not mean that the system is centrally planned; rather, strategic direction is embedded in the functional mandates of federal agencies. The FY 2024 distribution of federal R&D obligations shows that technological prioritization occurs through resource allocation across mission-oriented institutions (NCSES, 2026b). This feature is important for management analysis because it demonstrates how the U.S. model combines decentralization with strategic selectivity.

Economic performance functions as the outcome-validation layer of the LIFEG Framework. In international comparison, the United States remained the largest R&D-performing economy in 2022, accounting for approximately 30% of global R&D expenditures, compared with 27% for China and 18% for the EU-27. In absolute terms, U.S. GERD reached USD 923.2 billion in current PPP dollars, while China reached USD 811.9 billion and the EU-27 reached USD 542.1 billion. The U.S. GERD-to-GDP ratio was 3.59%, compared with 2.56% for China, 2.11% for the EU-27, 3.13% for Germany, and 5.21% for South Korea (National Science Board, 2025). These indicators confirm the strong global position of the U.S. innovation system, while also showing that performance must be evaluated comparatively rather than in isolation.

Table 2 summarizes the empirical application of the LIFEG Framework to the U.S. innovation system and shows how the five dimensions are connected to observable indicators and strategic management interpretation.

Table 2

Empirical Application of the LIFEG Framework to the U.S. Innovation System

LIFEG Dimension	Empirical Evidence	Strategic Management Interpretation
Institutional Governance	Federal R&D obligations reached USD 194.2 billion in FY 2024. Five agencies – DOD, HHS, DOE, NASA, and NSF – accounted for 93% of the federal R&D portfolio.	The U.S. system is managed through institutional specialization and distributed agency missions rather than through a single centralized innovation authority.
Public Support Mechanisms	U.S. R&D totaled USD 937 billion in 2023 and was estimated at USD 993 billion in 2024. R&D intensity reached 3.39% of GDP in 2024.	Public support operates as an enabling mechanism that complements a predominantly business-driven R&D system.
Commercialization Capacity	The USPTO granted 324,042 patents in 2024. The United States had approximately 3.5 million patents in force in 2024.	Commercialization capacity reflects the system's ability to convert research and technological activity into protected and market-relevant outputs.
Strategic Technological Priorities	Federal R&D obligations are concentrated in agencies associated with defense, health, energy, space, and basic science missions.	Strategic priorities are embedded in mission-oriented agencies and resource allocation rather than imposed through centralized planning.
Economic Performance	The United States accounted for approximately 30% of global R&D expenditures in 2022 and recorded a GERD-to-GDP ratio of 3.59%.	Economic performance validates the broader innovation-management capacity of the system and situates the U.S. model within global competition.

Source: developed by the author based on NCSES (2026a; 2026b), IPO & Harrity Analytics (2025), WIPO (2025), and National Science Board (2025).

The results presented in Table 2 show that the U.S. innovation system demonstrates strong strategic management capacity across all five LIFEG dimensions. Institutional governance is characterized by distributed specialization, where different agencies manage different technological missions. Public support mechanisms provide stability and direction while allowing the private sector to remain the dominant driver of R&D activity. Commercialization capacity is supported by a developed intellectual property system and a high volume of patent activity. Strategic technological priorities are expressed through the concentration of R&D obligations in mission-oriented agencies. Economic performance confirms that these mechanisms are associated with a globally significant innovation system.

At the same time, the LIFEG Framework does not interpret these indicators as direct causal proof that any single policy instrument determines economic performance. Rather, the framework evaluates the coherence of the system as a whole. The U.S. case demonstrates that high innovation performance is generated by the interaction of institutional governance, resource management, commercialization mechanisms, strategic technological direction, and economic outcomes. This is the main analytical advantage of the LIFEG approach: it does not reduce innovation policy assessment to one variable, but evaluates the management coherence of the entire innovation system.

From the perspective of strategic management, the U.S. model can be described as a hybrid innovation-management system. It combines decentralized institutional authority, substantial private-

sector R&D, selective federal support, strong intellectual property protection, and mission-oriented technological prioritization. The effectiveness of this model lies not in administrative centralization, but in the capacity to coordinate specialized institutions, align public and private resources, support commercialization, and maintain strategic technological direction.

The empirical application of the LIFEG Framework therefore confirms the central argument of this study: U.S. innovation policy effectiveness is determined by the strategic management of interaction among governance structures, support mechanisms, commercialization capacity, technological priorities, and economic-performance outcomes. This makes the framework useful not only for assessing the U.S. innovation system, but also for future comparative studies of national innovation systems in different institutional and economic contexts.

From a strategic management perspective, the empirical application of the LIFEG Framework should be interpreted not only as a descriptive assessment of the U.S. innovation system, but also as a diagnostic evaluation of its management strengths and potential vulnerabilities. The main analytical advantage of the framework is that it distinguishes between input indicators, conversion indicators, strategic-allocation indicators, and outcome-validation indicators. This distinction allows innovation policy to be assessed as a managed system rather than as a collection of separate statistical measures.

The U.S. case shows that the national innovation system demonstrates strong performance across several dimensions. However, the diagnostic value of the LIFEG Framework lies not only in confirming strengths, but also in identifying strategic tensions. For example, the high role of business-funded R&D indicates strong market-driven innovation capacity, while the lower share of federally funded R&D as a percentage of GDP confirms that federal support plays a selective and stabilizing role rather than a dominant financing role. Similarly, the concentration of federal R&D obligations in a small number of mission-oriented agencies reflects strategic specialization, but also shows that the direction of innovation policy depends heavily on the priorities and budgetary dynamics of these agencies.

An additional management-relevant indicator is the distribution of federal R&D obligations by type of activity. In FY 2023, 25% of federal R&D obligations were devoted to basic research, 29% to applied research, and 46% to experimental development. In absolute terms, this represented USD 47.3 billion for basic research, USD 54.3 billion for applied research, and USD 84.8 billion for experimental development (National Science Board, 2025). This structure demonstrates that federal innovation support is not limited to scientific knowledge generation, but also extends across applied and development-oriented stages of the innovation cycle. From the perspective of strategic innovation management, this indicates a portfolio-based approach in which public support is distributed across different stages of technological development.

Commercialization capacity also requires interpretation beyond patent indicators. Patent activity demonstrates the codification and legal protection of technological outputs, but it does not fully capture market transition, scaling, and private risk financing. Venture capital provides an additional market-oriented indicator of commercialization capacity because it reflects the ability of innovative firms to attract private financing for growth and technological expansion. The Q1 2026 PitchBook-NVCA Venture Monitor reported USD 267.2 billion in quarterly venture deal value and USD 347.3 billion in exit value; the same report notes that excluding the five largest deals and exits would reduce these figures by 73.2% and 86.6%, respectively (PitchBook & NVCA, 2026). This indicates both the strength and concentration risk of U.S. venture-based commercialization.

Strategic technological priorities are also increasingly visible through targeted industrial-policy instruments. The CHIPS and Science Act provided the U.S. Department of Commerce with USD 50 billion to strengthen the U.S. position in semiconductor research, development, and manufacturing. Within this structure, USD 11 billion is directed toward the domestic semiconductor R&D ecosystem, while USD 39 billion supports incentives for investment in facilities and equipment in the United States (NIST, 2026). From the LIFEG perspective, this represents a strategic-priority signal:

U.S. innovation policy remains decentralized, but it increasingly incorporates targeted industrial-policy mechanisms in areas of economic and national-security importance.

At the same time, commercialization and global competition indicators show that the U.S. innovation system faces increasing international pressure. Although the United States maintains one of the largest active patent stocks in the world and remains the leading R&D-performing economy, global patenting dynamics indicate growing competition, particularly from China. Therefore, the strategic management of U.S. innovation policy must be evaluated not only through current performance, but also through the system's ability to sustain technological leadership under changing global conditions.

Table 3 presents a LIFEG-based strategic diagnostic matrix that summarizes the main empirical signals, management interpretation, possible strategic risks, and implications for innovation-policy management.

Table 3

LIFEG-Based Strategic Diagnostic Matrix of the U.S. Innovation System

LIFEG Dimension	Empirical Signal	Strategic Management Interpretation	Potential Strategic Risk	Management Implication
Institutional Governance	Federal R&D obligations reached USD 194.2 billion in FY 2024; five agencies accounted for 93% of the federal R&D portfolio.	Innovation policy is managed through institutional specialization and mission-oriented agency structures.	High dependence on priorities and budget dynamics of a limited number of major agencies.	Maintain coordination among specialized agencies while reducing fragmentation and duplication.
Public Support Mechanisms	U.S. R&D reached USD 937 billion in 2023 and was estimated at USD 993 billion in 2024; R&D intensity reached 3.39% of GDP.	The system combines large-scale innovation investment with a strong public-private funding structure.	Public support may remain selective while private-sector priorities dominate the direction of applied innovation.	Strengthen complementarity between federal support, business R&D, and long-term national technology priorities.
R&D Portfolio Management	In FY 2023, federal R&D obligations were distributed across basic research (25%; USD 47.3 billion), applied research (29%; USD 54.3 billion), and experimental development (46%; USD 84.8 billion).	Federal support covers multiple stages of the innovation cycle, from knowledge generation to technological development.	Overconcentration in experimental development may reduce long-term exploratory capacity if basic research support weakens.	Preserve balance across basic, applied, and development-oriented R&D activities.
Commercia-lization Capacity	The USPTO granted 324,042 patents in 2024; the United States had approximately 3.5 million patents in force in 2024; Q1 2026 venture activity reached USD 267.2 billion in deal value and USD 347.3 billion in exit value but was highly concentrated among the largest deals and exits.	Patents indicate codification and legal protection, while venture capital reflects market-financing capacity and the ability of innovative firms to scale.	Patent quantity and large venture-financing volumes do not automatically guarantee broad technology diffusion, productivity impact, or balanced commercialization across sectors.	Strengthen research-to-market conversion, technology transfer, and broader commercialization channels beyond patenting and highly concentrated venture deals.

Table 1 (continuance)

Strategic Technological Priorities	Federal R&D obligations are concentrated in mission-oriented agencies; CHIPS for America directs major federal support toward semiconductor R&D, manufacturing capacity, and industrial technology priorities.	Strategic priorities are embedded both in agency missions and in targeted industrial-policy instruments.	Targeted interventions may create coordination challenges if sector-specific priorities are not aligned with the broader decentralized innovation system.	Align mission-oriented programs, industrial-policy tools, and federal R&D priorities while preserving flexibility, competition, and market responsiveness.
Economic Performance	The United States accounted for approximately 30% of global R&D expenditures in 2022 and recorded a GERD-to-GDP ratio of 3.59%.	Economic performance confirms the global strength of the U.S. innovation-management system.	Global competition, especially in patenting and technology-intensive sectors, may weaken long-term leadership if strategic adaptation slows.	Use comparative indicators to monitor leadership, resilience, and strategic competitiveness over time.

Source: developed by the author based on NCSES (2026a; 2026b), National Science Board (2025), IPO & Harrity Analytics (2025), WIPO (2025), PitchBook & NVCA (2026), and NIST (2026).

The diagnostic matrix shows that the U.S. innovation system is not simply strong because of its funding volume, patent output, or agency structure. Its strength lies in the interaction of these elements as a strategic management architecture. The LIFEG Framework makes this interaction visible by connecting institutional governance, public support, R&D portfolio management, commercialization capacity, technological prioritization, and economic-performance validation.

The most important contribution of the diagnostic matrix is that it reveals strategic tensions within the U.S. innovation system. The first tension concerns decentralization and coordination. The U.S. model benefits from distributed institutional authority, specialized agencies, universities, private-sector actors, and market-based innovation mechanisms. However, this decentralization also requires continuous coordination among agencies, funding streams, technological priorities, and commercialization channels. Without such coordination, institutional specialization may turn into fragmentation.

The second tension concerns public support and private-sector dominance. The United States demonstrates a strong business-driven R&D structure, while federal support performs a selective and stabilizing role. This hybrid structure is one of the strengths of the U.S. model, but it also creates a management challenge: public support must remain sufficiently strategic to sustain long-term technological priorities, while avoiding excessive displacement of market-based innovation incentives.

The third tension concerns commercialization capacity. Patent activity and patents in force demonstrate the codification and legal protection of technological outputs, while venture capital reflects market-oriented financing and scaling capacity. However, high patent volume and large venture-financing flows do not automatically guarantee broad technology diffusion, productivity growth, or balanced commercialization across sectors. This means that commercialization must be evaluated not only by the existence of protected inventions, but also by the system's capacity to transform knowledge into widely adopted and economically meaningful outcomes.

The fourth tension concerns targeted industrial policy within a decentralized innovation system. Instruments such as CHIPS for America demonstrate that U.S. innovation policy increasingly incorporates selective industrial-policy mechanisms in strategically important sectors. This strengthens technological direction, but it also increases the need to align targeted interventions with the broader

innovation ecosystem. The management challenge is to preserve the flexibility of the decentralized U.S. model while strengthening strategic coordination in areas of national technological importance.

Thus, the LIFEG Framework does not merely summarize empirical indicators; it identifies where the innovation system is coherent and where potential bottlenecks may emerge. A system may demonstrate high R&D investment but weak commercialization; strong patent activity but limited economic translation; or developed institutional structures but insufficient cross-agency coordination. In the U.S. case, the evidence suggests a highly developed and globally significant innovation system, but also one that must continuously manage the balance between decentralization, mission-oriented support, private-sector dominance, venture-capital concentration, targeted industrial policy, and international technological competition.

The practical value of the LIFEG Framework therefore lies in its ability to support strategic innovation-management decisions. It can be used to assess whether public support is aligned with technological priorities, whether institutional specialization contributes to policy coherence, whether commercialization mechanisms convert research into usable outputs, and whether economic-performance indicators confirm the effectiveness of the system as a whole. This makes the framework applicable not only to the U.S. case, but also to comparative studies of national innovation systems in different institutional environments.

Conclusions. This study demonstrates that the evaluation of innovation policy should move beyond the tracking of isolated indicators, such as R&D expenditures, patent activity, institutional presence, or macroeconomic performance, and should instead focus on the strategic management coherence of the national innovation system. The operationalization of the LIFEG Framework confirms that innovation policy effectiveness emerges from the interaction of institutional governance, public support mechanisms, commercialization capacity, strategic technological priorities, and economic performance as an integrated management architecture.

The theoretical contribution of the study lies in shifting the analysis of innovation policy from descriptive innovation-system interpretation toward operational strategic management evaluation. While classical innovation theories, national innovation systems theory, the Triple Helix model, and the entrepreneurial state perspective explain important aspects of innovation dynamics, the LIFEG Framework provides a structured tool for assessing whether the main components of innovation policy operate coherently as a managed system. In this respect, the framework contributes to innovation management research by linking governance coordination, resource allocation, commercialization mechanisms, technological prioritization, and economic-performance validation within one analytical model.

The empirical application to the U.S. case shows that the strength of the American innovation system does not result from administrative centralization. Rather, it is based on a hybrid strategic management model that combines decentralized institutional governance, strong private-sector R&D activity, selective federal support, mission-oriented agencies, developed intellectual property protection, venture-based commercialization, and targeted industrial-policy instruments such as CHIPS for America. This confirms that the U.S. model is not purely market-driven and not centrally planned; its effectiveness depends on the ability to coordinate distributed institutions, public and private resources, commercialization channels, and strategic technological priorities.

From a practical policy-management perspective, the LIFEG Framework can be used as a diagnostic tool for identifying strengths, vulnerabilities, and bottlenecks within national innovation systems. By distinguishing between input drivers, conversion mechanisms, strategic-allocation indicators, and outcome-validation indicators, the framework allows policymakers and researchers to assess whether innovation policy functions as an integrated strategic management system. For example, a country may demonstrate high R&D funding but weak commercialization capacity, strong patent activity but insufficient economic translation, or developed institutional structures but weak cross-agency coordination. The LIFEG approach makes such imbalances visible.

At the same time, the study has several limitations. The current operationalization relies on publicly available proxy indicators and does not construct a fully weighted composite index. The proposed formula expresses conceptual interdependence among the framework's dimensions rather than an econometric model of causality. Future research may therefore extend the LIFEG Framework by developing a weighted index, applying expert-based weighting methods, conducting cross-country comparisons, or testing the framework in specific technological sectors such as artificial intelligence, semiconductors, biotechnology, clean energy, and defense-related innovation.

Overall, the LIFEG Framework offers an original strategic management evaluation model for analyzing innovation policy coherence in complex national innovation systems. Its value lies not only in describing the components of innovation policy, but in showing how these components interact, where bottlenecks may arise, and how strategic management decisions can strengthen the connection between governance, support, commercialization, technological priorities, and economic outcomes.

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DOI https://doi.org/10.30525/2592-8813-2026-2-6

THEORETICAL AND METHODOLOGICAL FOUNDATIONS OF CRISIS MANAGEMENT FOR ENTERPRISES IN THE GAS SECTOR UNDER A WARTIME ECONOMY

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Abstract. The article examines the theoretical and methodological foundations of anti-crisis management of gas sector enterprises under the conditions of a wartime economy and identifies the main directions for strengthening the resilience of Ukraine's energy infrastructure. The study applies systemic, risk-oriented, structural-functional, and scenario analysis methods, which made it possible to comprehensively assess current crisis challenges affecting gas sector enterprises. The impact of military actions, infrastructure destruction, financial instability, personnel shortages, and cybersecurity threats on the efficiency of energy enterprises was analyzed. The necessity of implementing digital technologies, strategic resilience systems, and innovative anti-crisis management models was substantiated. It was determined that effective anti-crisis management should be based on the integration of strategic planning, state support, digitalization, and international cooperation. Prospects for further research are related to the development of artificial intelligence technologies and mechanisms for the post-war recovery of the energy sector.

Key words: anti-crisis management, gas sector, wartime economy, energy security, crisis management, digitalization, resilience, gas sector enterprises.

Introduction. The current stage of Ukraine's economic development is characterised by a high level of instability caused by large-scale military operations, the transformation of energy markets, increased geopolitical risks, and the need to ensure the country's energy security. In such conditions, the functioning of enterprises in the gas sector takes on particular significance, as they are strategically important elements of the state's critical infrastructure and ensure the stability of the energy system, industrial production, and the housing and utilities sector. Ukraine's gas sector plays a key role in shaping the country's energy independence and maintaining economic stability under a war economy.

The military aggression against Ukraine has significantly impacted the operations of gas sector enterprises. The destruction of energy infrastructure facilities, disruptions in logistics chains, a shortage of financial resources, rising energy costs, staff losses and the constant threat of cyberattacks constitute a complex set of systemic crisis challenges for the industry. Under such conditions, traditional management mechanisms lose their effectiveness, necessitating the development of new approaches to crisis management capable of ensuring the adaptability, resilience and continuity of operations for enterprises in the gas sector.

The issue of crisis management has long been a focus of attention for both domestic and international scholars. Significant contributions to the development of crisis management theory have been made by researchers such as I. Ansoff (1975), M. Porter (1985), P. Drucker (2008), V. Vasylenko (2005), A. Didyk et al. (2019). Their works address issues of strategic crisis management, mechanisms for ensuring the economic security of enterprises, methods of risk forecasting, and approaches to managing organisational resilience. However, most existing scientific approaches were developed in the context of peaceful economic development and do not take into account the specific nature of enterprise operations under a war economy.

Research into crisis management is of particular relevance in the gas sector, as this industry is extremely sensitive to external and internal threats. Military operations create not only physical risks

of infrastructure destruction but also give rise to new types of crisis phenomena: energy shortages, information and cyber threats, disruptions to state regulatory systems, increased financial instability and complications in the international energy sector. In this regard, there is a need to develop a comprehensive methodology for crisis management that takes into account the multi-level nature of modern crisis processes.

In contemporary academic literature, increasing attention is being paid to issues relating to ensuring business resilience, the digitalisation of management processes, and the use of innovative technologies in crisis management systems. In particular, research is being conducted into the potential applications of artificial intelligence, digital risk monitoring platforms, automated energy network management systems, and mechanisms for scenario-based forecasting of crisis situations (Shevchenko & Melnyk, 2023). However, the issue of integrating these tools into the management system of gas sector enterprises under a wartime economy remains insufficiently developed.

Furthermore, the relevance of the research is heightened by Ukraine's European integration processes and the need to harmonise the national energy management system with European Union standards. The implementation of modern crisis management mechanisms is a key prerequisite for enhancing the competitiveness of gas sector enterprises, ensuring the country's energy security, and establishing a sustainable model for post-war economic recovery.

The need to study the theoretical and methodological foundations of crisis management in the gas sector is driven by a combination of economic, energy, security and managerial factors that arise in a wartime economy. The insufficient adaptation of existing crisis management models to contemporary challenges necessitates the development of new scientific approaches to ensure the effective functioning of enterprises in Ukraine's gas sector.

Main text. The current economic climate in Ukraine is characterised by a high degree of turbulence, driven by the impact of military operations, the destruction of critical infrastructure, instability in energy markets, and the need to ensure the uninterrupted operation of strategically important sectors. In such conditions, enterprises in the gas sector become key elements of the national energy security system, upon whose operational efficiency the stability of the state economy, the social sphere and the defence sector depends. It is for this reason that the issue of establishing an effective crisis management system for gas sector enterprises in a wartime economy is of particular relevance.

The aim of this article is to examine the theoretical and methodological foundations of crisis management for gas sector enterprises under a wartime economy, as well as to justify contemporary approaches to establishing an effective crisis management system aimed at ensuring the resilience, adaptability and continuity of operations within the energy sector.

To achieve the stated objective, the following research tasks are set out in this article:

– to analyse theoretical approaches to defining the essence of crisis management;

– to examine the specific features of how enterprises in the gas sector operate under a war economy;

– to identify the main crisis risks and threats to the operations of enterprises in the gas sector;

– to characterise contemporary methodological approaches to crisis management;

– to investigate mechanisms for ensuring the economic and energy stability of enterprises;

– to analyse the role of digitalisation and innovative technologies in the crisis management system;

– to formulate practical recommendations for improving the crisis management system of enterprises in Ukraine's gas sector.

The subject of the study is the processes of crisis management in gas sector enterprises under a war economy.

The subject of this study is the theoretical, methodological and applied aspects of developing a crisis management system for enterprises in the gas sector amidst the crisis-driven transformations of the economic environment.

The methodological basis of the study consists of a range of general scientific and specialised methods of scientific inquiry. The study utilised methods of systems analysis, generalisation, comparison, scientific abstraction, structural-functional analysis and scenario forecasting. The application of a systems approach enabled the examination of crisis management as a multi-level system of interrelated management mechanisms aimed at ensuring the sustainability of enterprises in the gas sector. The method of structural-functional analysis was used to study the organisational mechanisms of crisis response, and the method of scenario forecasting was used to assess the potential risks to the long-term functioning of enterprises.

The theoretical framework of this study is based on the works of Ukrainian and international scholars in the fields of crisis management, strategic management, energy security and the economic resilience of enterprises. Considerable attention is paid to the study of modern concepts of risk management, organisational resilience and the digital transformation of management systems. Furthermore, the study takes into account current trends in the development of Ukraine's energy sector and international experience in the operation of critical energy infrastructure during crisis situations.

The practical significance of the study lies in the possibility of using the results obtained to improve the crisis management system of enterprises in the gas sector, develop effective crisis response mechanisms, enhance economic security, and ensure the stable operation of enterprises during a period of a wartime economy. The proposed approaches can be utilised by government bodies, mana gers of enterprises in the fuel and energy sector, and specialists in the field of strategic management.

The scientific novelty of this study lies in the comprehensive justification of the theoretical and methodological foundations of crisis management for enterprises in the gas sector under a wartime economy, as well as in the identification of modern mechanisms for ensuring the resilience and adaptability of enterprises based on the integration of strategic management, digital technologies and risk-oriented approaches to crisis management.

In the current context of global economic development, the issue of ensuring the effective functioning of enterprises in conditions of instability is of particular importance. The increasing frequency of crises, the intensification of global risks, energy transitions and military conflicts are creating new challenges for the management systems of enterprises in strategic sectors of the economy. This applies particularly to enterprises in the gas sector, whose activities are directly linked to ensuring the country's energy security, the stable functioning of the industrial complex and the maintenance of the country's socio-economic balance.

The theoretical foundations of crisis management have evolved over a long period of time, influenced by developments in economic science, management theory and the practical operation of enterprises in crisis conditions. In the academic literature, crisis management is regarded as a system of managerial measures aimed at preventing, identifying, containing and overcoming crisis phenomena whilst minimising the negative consequences for the enterprise (Lihonenko, 2016, p. 161). At the same time, contemporary researchers emphasise that crisis management is not limited to merely reacting to a crisis, but involves the formation of a long-term system of strategic resilience for the enterprise.

One of the key aspects of crisis management is its comprehensive nature. The crisis management system encompasses the financial, organisational, human resources, production, information and security components of an enterprise's operations. For enterprises in the gas sector, this is of particular importance, as the functioning of the industry depends on the continuity of technological processes, the stability of logistics systems and the effectiveness of critical infrastructure management.

In academic theory, there are several approaches to defining the nature of crisis management. The classical approach is based on the concept of reactive management, according to which the primary function of management is to overcome an existing crisis and restore stability to the enterprise's operations. However, current economic conditions necessitate a shift towards a preventive model

of crisis management, which involves the early diagnosis of crisis phenomena, risk forecasting, and the development of mechanisms for the enterprise to adapt to changes in the external environment (Manzhos, 2013).

Enterprises in the gas sector operate in a high-risk environment, driven by economic, political, technological and military factors. In this context, a systematic approach to crisis management is of particular importance. According to the systems concept, an enterprise is viewed as a complex, multi-level system in which all elements are interrelated. A disruption in the functioning of a single element of the system can lead to a large-scale crisis affecting the enterprise's production, financial and management spheres (Drucker, 2008).

An important element of the theoretical foundations of crisis management is the classification of crisis phenomena. Financial, operational, logistical, managerial, human resources, information and energy crises are characteristic of enterprises in the gas sector. In a wartime economy, these risks are compounded by threats of physical destruction of infrastructure, cyberattacks, shortages of material resources, disruptions to international energy links and instability in state regulation (Morozova et al., 2024). This is precisely why crisis management in the gas sector must be based on the principles of adaptability, flexibility and continuous risk monitoring.

Among the key principles of crisis management in contemporary academic literature, the following are highlighted: the principle of systematicity, strategic orientation, prompt response, information availability, economic feasibility and innovation. The principle of systematicity involves a comprehensive approach to crisis management and takes into account the interrelationships between all structural elements of the enterprise. The principle of strategic orientation is aimed at ensuring the long-term sustainability of the enterprise and developing mechanisms for its adaptation to external changes (Gudz, 2022).

The principle of information security is of particular importance to companies in the gas sector, as the effectiveness of crisis management depends to a large extent on the quality of a company's information and analytical system. In today's environment, digital technologies, automated monitoring systems, risk forecasting and artificial intelligence tools play a vital role, enabling the rapid identification of crisis trends and the formulation of management decisions (Farat et al., 2025).

Crisis management in the gas sector is also closely linked to the enterprise's economic security system. Ensuring economic security involves creating conditions for the stable operation of the enterprise, protecting its resource potential, maintaining financial stability, and minimising external and internal threats. In a wartime economy, the economic security system of gas sector enterprises transforms into a comprehensive system of strategic resilience, combining economic, technological, information and security management mechanisms.

The theoretical foundations of crisis management for enterprises in the gas sector are based on a comprehensive combination of strategic, systemic, risk-oriented, and adaptive management approaches. The current conditions of a wartime economy require a rethinking of classical models of crisis management and the development of new mechanisms to ensure the resilience of enterprises capable of functioning effectively amid multi-level crisis threats.

The wartime economy creates fundamentally new operating conditions for enterprises in the gas sector, characterized by a high level of uncertainty, instability in resource supply, the destruction of production infrastructure, a shortage of financial resources, and a constant threat to the security of critical energy system facilities. Under such conditions, traditional enterprise management methods lose their effectiveness, necessitating the development of new methodological approaches to crisis management capable of ensuring the resilience, adaptability, and continuity of operations for enterprises in the gas sector.

The concept of a war economy in contemporary academic literature is viewed as a specific type of economic system that operates under conditions of military conflict, resource mobilization,

and heightened levels of state regulation. The main feature of a war economy is the concentration of economic resources on ensuring the state's defense capability and maintaining critical infrastructure (Danylyshyn, 2025). For enterprises in the gas sector, this means the necessity of operating under conditions of constant crisis risks, which requires a transition from a traditional management model to an adaptive crisis management system.

One of the key methodological approaches to crisis management is the systems approach, which involves viewing the enterprise as a holistic, multi-level system whose elements are interconnected. Within the framework of the systems approach, a gas sector enterprise is viewed not merely as a production entity, but as a component of the state's energy security, whose activities influence the stability of the country's economic and social systems. The application of the systems approach allows for identifying the key elements of an enterprise's crisis resilience, assessing the interrelationship between risks, and developing a comprehensive crisis management system.

The risk-oriented approach plays a significant role in crisis management methodology. Its essence lies in the constant monitoring of internal and external threats, assessing the likelihood of crisis situations, and developing mechanisms to prevent them. For enterprises in the gas sector, the risk-oriented approach is particularly important, as the industry's operations are associated with a high level of technological, financial, environmental, and security risks. In a wartime economy, these risks are compounded by threats of infrastructure destruction, cyberattacks, disruptions in energy supply, and instability in government regulation.

Modern crisis management methodology also involves the use of a scenario-based approach, which is based on forecasting possible outcomes of crisis situations and developing alternative models for management decisions. Scenario-based forecasting allows gas sector enterprises to assess the potential consequences of crisis phenomena, model response options, and ensure preparedness for emergencies. War economy conditions are characterized by a high level of unpredictability, so the use of a scenario-based approach becomes an essential component of the strategic crisis management system.

The concept of enterprise resilience is of particular importance in today's conditions. In the scientific literature, resilience is defined as an organization's ability to adapt to crisis conditions, quickly restore operations after negative impacts, and ensure operational stability amid constant change (Farat et al., 2025). For enterprises in the gas sector, building resilience involves creating flexible organizational structures, diversifying resource provision, developing crisis monitoring systems, and implementing modern digital management technologies.

Strategic planning is a key methodological element of crisis management. In today's environment, strategic crisis planning is aimed not only at ensuring the company's financial stability but also at establishing mechanisms for long-term adaptation to crisis-induced changes. For enterprises in the gas sector, strategic planning must include an assessment of the risks of infrastructure destruction, scenarios for ensuring energy security, mechanisms for backup resource supply, and measures for the digital transformation of management systems (Morozova et al., 2024).

One of the most important areas of development in modern crisis management methodology is the digitalization of management processes. The use of digital monitoring platforms, automated risk analysis systems, artificial intelligence technologies, and big data enables more effective management decision-making and ensures a rapid response to crisis situations (Shevchenko & Melnyk, 2023). For companies in the gas sector, digital technologies are of particular importance, as they enable remote monitoring of critical infrastructure operations and enhance energy security.

In addition, an institutional approach plays a key role in crisis management methodology, which involves accounting for the impact of government policy, regulatory frameworks, and international cooperation on the operations of gas sector enterprises. Under a wartime economy, state regulation of the energy sector intensifies, and gas sector enterprises become vital components of the national security system (Danylyshyn, 2025). This is precisely why the effectiveness of crisis management

depends to a large extent on the level of interaction between enterprises and government agencies, international energy organizations, and financial institutions.

Modern methodological approaches to crisis management for gas sector enterprises in a wartime economy are based on a combination of systemic, risk-oriented, scenario-based, strategic, and institutional management approaches. Their comprehensive application allows for the development of effective crisis response mechanisms, ensures the stability of enterprise operations, and enhances the country's energy security in the face of multi-level crisis threats.

The current phase of operations for enterprises in Ukraine's gas sector is marked by an unprecedented level of crisis-related challenges caused by military hostilities, global energy instability, the transformation of international energy markets, and the intensification of domestic economic risks. Gas sector enterprises are key elements of the state's critical infrastructure; therefore, any disruptions to their operations directly impact the country's energy security, the stability of industrial production, and the state's socioeconomic development.

One of the most significant crisis challenges for gas sector enterprises has been the destruction of energy infrastructure as a result of military operations. Gas transmission system facilities, underground gas storage facilities, compressor stations, and energy hubs have become targets of systematic attacks, leading to disruptions in the stability of energy supply and an increased risk of emergencies (Morozova et al., 2024). The destruction of critical infrastructure places an additional burden on enterprise management systems and requires the rapid implementation of crisis response mechanisms.

Disruptions to logistics and production processes remain a significant challenge. A wartime economy is characterized by restricted transport routes, shortages of material and technical resources, difficulties in supplying equipment, and rising costs associated with maintaining production processes. For gas sector enterprises, this means an increased risk of disruptions in natural gas transportation, delays in repair work, and complications in infrastructure modernization processes. Additionally, the instability of logistics chains negatively impacts the financial stability of enterprises and reduces the efficiency of their operations.

One of the key challenges at the current stage of the gas sector's development is the threat to cybersecurity and the information infrastructure of enterprises. The active implementation of digital technologies and automated control systems significantly increases the efficiency of enterprises' operations, but at the same time creates new risks associated with cyberattacks and information threats. Disruptions to digital management systems for gas transmission infrastructure can lead to large-scale man-made accidents, interruptions in energy supply, and destabilization of the country's energy system (Farat et al., 2025). In this regard, gas sector enterprises are compelled to develop new information security mechanisms and strengthen the protection of critical digital systems.

A significant crisis factor is the financial instability of gas sector enterprises. Military operations have led to a decline in investment activity, increased costs for infrastructure restoration, reduced consumer purchasing power, and more difficult access to international financial resources. Companies are forced to operate under conditions of working capital shortages, high inflation, and currency market instability, which significantly complicates the implementation of strategic development programs (Shevchenko & Melnyk, 2023). Furthermore, financial instability limits companies' ability to modernize production facilities and adopt innovative technologies.

The issue of the labor shortage in the gas sector is becoming particularly acute. A significant portion of skilled workers has been mobilized or forced to leave their homes due to military operations. This leads to a shortage of professional staff, complicates human resources management processes, and reduces the efficiency of enterprise operations. At the same time, gas sector enterprises require highly qualified specialists to maintain complex technical infrastructure and ensure the continuity of technological processes. In this regard, an important focus of crisis management is the development of a system for workforce stability and the adaptation of personnel to the conditions of a wartime economy.

Regulatory and legal challenges facing gas sector enterprises constitute a separate category of crisis-related challenges. Under a wartime economy, the state is tightening its control over the energy sector, which is accompanied by changes in regulatory frameworks, the introduction of new restrictions, and the transformation of mechanisms for state management of the energy market. Frequent changes in legislation, instability in tariff policy, and an increased administrative burden create additional risks for the operations of gas sector enterprises. This necessitates the adaptation of management mechanisms to the new operating conditions of the energy industry.

Global energy instability is a significant factor affecting the operations of gas sector enterprises. The global energy market is undergoing a profound transformation, accompanied by changes in energy consumption patterns, increased competition for energy resources, and heightened geopolitical risks. For Ukraine, this means the need to diversify energy supply sources, adapt to European energy standards, and develop new models of international energy cooperation (Danylyshyn, 2025). Gas sector enterprises must take these trends into account in the process of strategic planning and the development of a crisis management system.

In addition, ensuring the country's energy security remains a significant challenge. The gas sector is critical to the functioning of the defense industry, the utilities sector, and systems that support the population's livelihood. Any disruptions in the operations of gas sector enterprises can have far-reaching socioeconomic consequences and create additional risks to the country's national security (Morozova et al., 2024). This is precisely why the issue of establishing an effective crisis management system extends beyond the scope of individual enterprises and becomes an integral part of state policy in the field of energy security.

The current crisis challenges facing enterprises in Ukraine's gas sector are complex and multifaceted. Military operations, infrastructure destruction, financial instability, staffing issues, cyber threats, and global energy transformations are shaping new operating conditions for enterprises, which require the development of effective crisis management mechanisms. Under these conditions, the creation of an adaptive management system capable of ensuring the resilience of enterprises and maintaining the country's energy security takes on particular importance.

The effectiveness of crisis management for gas sector enterprises under a wartime economy depends largely on the management system's ability to respond promptly to crisis threats, adapt to an unstable external environment, and ensure the continuity of critical infrastructure operations. The current operating conditions of the energy sector require the development of a comprehensive crisis management system that integrates organizational, economic, digital, security, and strategic management mechanisms (Farat et al., 2025).

One of the fundamental elements of crisis management is the organizational mechanism for crisis response. Its primary task is to ensure the rapid adoption of management decisions in emergency situations and to coordinate the activities of all the enterprise's structural units. In gas sector enterprises, organizational mechanisms must include the establishment of crisis headquarters, systems for real-time monitoring of infrastructure status, backup control centers, and emergency response mechanisms (Gudz, 2022). In a wartime economy, the ability of the management system to function even in the event of partial destruction of production or information infrastructure becomes particularly important.

A crisis monitoring system is an important tool for crisis management. Its primary function is to continuously monitor internal and external risk factors, assess threat levels, and forecast potential crisis situations. For companies in the gas sector, the monitoring system must cover the technical condition of infrastructure, financial performance indicators, the level of energy security, the state of information systems, and external geopolitical risks. Continuous analysis of crisis factors allows for the timely identification of threats and minimization of the negative consequences of their impact.

The digitalization of crisis management systems is of particular importance in today's environment. The use of digital technologies ensures faster information processing, the automation of man-

agement processes, and the development of effective mechanisms for forecasting crisis situations. Gas sector enterprises are actively implementing automated process control systems, digital infrastructure monitoring platforms, cloud-based data storage technologies, and remote monitoring systems for critical facilities. Digitalization enhances enterprises' adaptability to crisis-induced changes and ensures rapid response to emergencies.

One of the most promising areas of development in crisis management is the use of artificial intelligence technologies. Artificial intelligence systems enable the analysis of large amounts of data, the forecasting of risks, the modeling of crisis scenarios, and the formulation of optimal management decisions. For enterprises in the gas sector, the application of artificial intelligence is of particular importance in the areas of forecasting emergency situations, assessing the technical condition of infrastructure, and ensuring energy security (Shevchenko & Melnyk, 2023). In addition, artificial intelligence technologies can be used to automate resource management processes, optimize logistics routes, and improve the efficiency of production processes.

An important element of crisis management is the mechanisms for ensuring the energy security of gas sector enterprises. Energy security involves creating conditions for the stable operation of natural gas supply systems, protecting critical infrastructure, and minimizing the risks of disruptions in energy supply. In today's environment, ensuring energy security involves diversifying gas supply sources, creating reserve capacities, modernizing the gas transmission system, and strengthening the protection of energy facilities against physical and cyber threats (Morozova et al., 2024).

Government support for gas sector enterprises plays a significant role in ensuring effective crisis management. In a wartime economy, the state coordinates the activities of the energy sector, provides financial support to strategically important enterprises, establishes the regulatory framework for crisis management, and organizes international cooperation in the field of energy security. State support also includes implementing programs to restore energy infrastructure, stimulating investment in the modernization of the gas sector, and promoting the adoption of innovative technologies.

One of the key areas of modern crisis management is the development of a system of strategic resilience for enterprises. An enterprise's resilience is defined as its ability to adapt to crisis conditions, maintain operational stability, and quickly resume operations after negative impacts. For enterprises in the gas sector, a strategic resilience system must include contingency management mechanisms, resource diversification, the development of cybersecurity systems, the creation of a talent pool, and the implementation of modern strategic planning models.

In addition, international cooperation in the field of energy security is an important mechanism for crisis management. Ukraine's integration into the European energy space creates opportunities to attract international technical assistance, investments in infrastructure modernization, and the exchange of experience in crisis management. Cooperation with international energy organizations allows for increasing the resilience of gas sector enterprises and adapting the national crisis management system to modern European standards (Danylyshyn, 2025).

Ensuring effective crisis management for enterprises in the gas sector under a wartime economy requires the comprehensive use of organizational, digital, strategic, and security management mechanisms. Modern tools for crisis response, digitalization, artificial intelligence, and strategic resilience form the basis of an adaptive management system capable of ensuring the stable operation of enterprises and maintaining the country's energy security amid multi-level crisis threats.

Current transformational processes in the global energy system, military challenges, and Ukraine's integration into the European economic space are shaping new conditions for the development of enterprises in the gas sector. In these conditions, improving the crisis management system takes on particular importance; it must ensure not only a rapid response to crises but also the development of long-term resilience of enterprises to external and internal threats. The prospects for the development of crisis management in gas sector enterprises are directly linked to the processes of

digitalization, modernization of energy infrastructure, the introduction of innovative technologies, and the harmonization of the national management system with European standards.

One of the key areas for the development of crisis management is the European integration of Ukraine's energy sector. Ukraine's participation in the European energy space requires adapting the management system of gas sector enterprises to European Union requirements in the areas of energy security, environmental policy, digital transformation, and crisis management. Harmonizing national legislation with EU standards creates conditions for improving the efficiency of enterprises, attracting foreign investment, and modernizing gas transmission infrastructure.

An important area of future development is the creation of innovative management models for gas sector enterprises. Current crisis conditions require a shift from traditional administrative management models to adaptive management systems based on the principles of flexibility, risk-oriented planning, and strategic resilience. In the scientific literature, increasing attention is being paid to the concept of adaptive management, which involves the continuous updating of management decisions in line with changes in the external environment and a rapid response to crisis challenges (Gudz, 2022).

The digitalization of management systems is of particular importance for the future development of crisis management. The use of digital technologies allows enterprises in the gas sector to increase the efficiency of management processes, ensure automated monitoring of infrastructure operations, and improve the quality of crisis forecasting. In today's environment, the implementation of digital risk monitoring platforms, big data technologies, automated information analysis systems, and intelligent management decision support systems holds great promise (Farat et al., 2025).

One of the most promising areas for the development of crisis management is the use of artificial intelligence and machine learning technologies. Artificial intelligence systems are capable of analyzing large amounts of data, predicting technical failures, assessing the level of crisis risks, and developing optimal response models for emergencies. This is of particular importance for enterprises in the gas sector, as it allows for improving the operational safety of critical infrastructure, optimizing production processes, and reducing the influence of the human factor on management decision-making (Shevchenko & Melnyk, 2023).

A promising direction for the development of crisis management is the creation of adaptive organizational structures within enterprises. The conditions of a wartime economy require gas sector enterprises to be able to rapidly change their management structure, reallocate resources, and ensure the functioning of crisis response systems even in the event of partial infrastructure destruction. Adaptive organizational structures must be based on the principles of decentralized management, rapid decision-making, and flexible coordination of activities among structural units.

An important factor in the future development of crisis management is the modernization of the energy infrastructure of gas sector enterprises. The destruction of energy system facilities as a result of military operations necessitates the creation of new models of energy resilience, which involve the diversification of energy supply sources, the development of backup gas supply systems, and the implementation of modern technologies for protecting critical infrastructure. In the post-war period, the modernization of the gas sector will become one of the key areas of the country's economic recovery.

The development of a system of strategic resilience for enterprises is of particular importance. The formation of a resilient management model involves creating mechanisms for the long-term adaptation of enterprises to crisis-induced changes, ensuring workforce stability, building up reserve financial resources, and strengthening information security systems. In today's environment, resilience is viewed as one of the key criteria for the effectiveness of a crisis management system.

Another promising area is the development of international cooperation in the field of energy security and crisis management. Ukraine is actively integrating into international energy programs and cooperating with European partners in the modernization of energy infrastructure, the development of digital technologies, and the enhancement of energy sector security. International cooperation creates

opportunities to attract investment, acquire modern technologies, and implement European standards for crisis management.

Furthermore, the prospects for the development of crisis management in gas sector enterprises are linked to the formation of a new state policy in the field of energy security. The state must ensure the creation of an effective regulatory framework for crisis management, stimulate innovative development in the energy sector, and support the digital transformation of enterprises. The conditions of a wartime economy require enhanced coordination between government agencies, gas sector enterprises, and international partners to ensure the stable operation of the country's energy system.

The prospects for the development of crisis management in the gas sector are linked to a comprehensive transformation of the management system, the digitalisation of management processes, the implementation of artificial intelligence technologies, the development of strategic resilience, and integration into the European energy area. Implementing these measures will enhance the resilience of gas sector enterprises, ensure the country's energy security and establish an effective crisis management system in the face of contemporary global challenges.

Conclusion. The study found that crisis management in gas sector enterprises under a wartime economy is one of the key elements in ensuring the country's energy security and the stable functioning of the national economy. Current crisis processes caused by military actions, the destruction of critical infrastructure, global energy instability, and economic transformations significantly complicate the operations of gas sector enterprises and require the development of new approaches to crisis management systems.

The study summarized the theoretical foundations of crisis management and determined that a modern crisis management system must be based on a comprehensive combination of strategic, systemic, risk-oriented, and adaptive approaches to enterprise management. It was established that traditional models of crisis management, developed under conditions of stable economic development, do not fully meet the modern challenges of a wartime economy and require significant transformation.

The study identified the main characteristics of how gas sector enterprises operate under a wartime economy. Key crisis factors include the destruction of energy infrastructure, instability of logistics systems, financial risks, personnel shortages, cyber threats, and a high level of uncertainty in the external environment. It has been established that these factors are complex in nature and directly affect the level of economic resilience of enterprises in the gas sector.

The study showed that one of the most effective directions for the development of crisis management is the implementation of a system of strategic resilience for enterprises. Resilience enables enterprises to adapt to crisis-induced changes, maintain the continuity of critical infrastructure operations, and establish mechanisms for rapid response to emergencies. It has been established that a strategic resilience system must include backup management mechanisms, diversification of resource provision, the development of information security systems, and the creation of adaptive organizational structures.

The paper substantiates the importance of using modern digital technologies in the crisis management system of gas sector enterprises. It has been determined that the digitalization of management processes, the use of automated monitoring systems, big data technologies, and artificial intelligence allow for improved forecasting of crisis situations, enhanced quality of management decisions, and ensure rapid response to crisis threats. Particular attention is paid to the role of artificial intelligence technologies in risk analysis, emergency situation forecasting, and the optimization of gas transmission infrastructure operations.

The study demonstrates that effective crisis management for gas sector enterprises is impossible without active state support and the development of a modern energy security system. The state must ensure regulatory and legal oversight of crisis management, support the modernization of energy infrastructure, encourage the adoption of innovative technologies, and coordinate the activities of energy sector enterprises during crisis situations.

Furthermore, the study establishes that the prospects for the development of crisis management in the gas sector are directly linked to Ukraine's European integration processes and the harmonization of the national energy management system with European standards. Integration into the European energy space creates opportunities for infrastructure modernization, attracting international investment, developing digital technologies, and implementing modern crisis management mechanisms.

The study's findings confirm that effective crisis management for gas sector enterprises under a wartime economy must be based on a comprehensive combination of strategic management, digitalization, risk management systems, government support, and mechanisms for strategic resilience. Implementing these approaches will ensure the stable operation of gas sector enterprises, enhance the country's energy security, and lay the groundwork for the post-war restoration of Ukraine's energy system.

Based on the conducted research, it has been established that the effective operation of gas sector enterprises under a wartime economy requires a comprehensive improvement of the crisis management system, focused on ensuring the adaptability, resilience, and continuity of critical energy infrastructure operations. Current crisis challenges necessitate a transition from traditional management mechanisms to innovative crisis response models based on the use of digital technologies, a risk-oriented approach, and strategic planning.

One of the key practical recommendations is the establishment of a multi-level crisis management system at gas sector enterprises, which should include mechanisms for continuous risk monitoring, crisis forecasting, contingency management, and rapid response to emergencies. Particular attention should be paid to the creation of crisis management centers capable of coordinating the company's activities in the face of military threats and infrastructure destruction.

An important area for improving the crisis management system is the development of digital transformation in gas sector enterprises. It is recommended to actively implement automated production process management systems, digital risk monitoring platforms, remote infrastructure control systems, and big data technologies. The use of modern digital tools will improve the effectiveness of management decision-making, reduce response times to crisis situations, and ensure the continuity of the energy system's operation.

A promising direction for the development of crisis management is the implementation of artificial intelligence and machine learning technologies in the management processes of gas sector enterprises. The use of intelligent forecasting systems will enable the timely identification of crisis trends, analysis of the technical condition of infrastructure, modeling of emergency risks, and optimization of enterprise resource utilization. In today's environment, the digitalization and automation of management systems are becoming critical components of ensuring the nation's energy security.

Of particular importance is the need to strengthen workforce stability at gas sector enterprises. It is recommended to establish a talent pool system, develop staff training programs, implement remote management mechanisms, and create conditions for employees to adapt to operating in crisis situations. Workforce stability is one of the key elements in ensuring the continuity of critical infrastructure operations under a wartime economy.

An important area for the practical implementation of crisis management is the modernization of the energy infrastructure of gas sector enterprises. It is advisable to implement modern technologies for protecting critical infrastructure facilities, develop backup energy supply systems, diversify energy sources, and enhance the cybersecurity of energy systems. The implementation of these measures will reduce enterprises' dependence on external crisis factors and increase their strategic resilience.

The study found that the state must play a key role in ensuring effective crisis management. It is recommended to improve the regulatory framework for crisis management, develop state programs to support gas sector enterprises, stimulate investment in the modernization of energy infrastructure, and foster international cooperation in the field of energy security. State policy should be aimed at forming a comprehensive system for protecting critical energy infrastructure and ensuring the stable functioning of the state's energy sector.

Prospects for further research include the development of innovative models for crisis management in gas sector enterprises, the study of mechanisms for the digital transformation of management systems, the evaluation of the effectiveness of artificial intelligence technologies in management processes, and the development of strategic resilience systems for enterprises. Particular attention should be paid to studying the postwar restoration of Ukraine's energy infrastructure, the adaptation of enterprises to European energy security standards, and the development of international energy cooperation.

The study confirms the need for a comprehensive transformation of the crisis management system of gas sector enterprises under a wartime economy. Implementing the proposed practical recommendations will help increase the resilience of enterprises, ensure the country's energy security, and establish an effective crisis management system in the face of contemporary global challenges.

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DOI https://doi.org/10.30525/2592-8813-2026-2-7

THE FORMATION OF THE UKRAINIAN NATION: THE LITHUANIAN-POLISH PERIOD AND ITS LEGAL IMPLICATIONS

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Abstract. This study is devoted to a comprehensive analysis of the role of the Lithuanian-Polish period as a key stage in the genesis of the Ukrainian nation. The work examines the historical preconditions for the integration of Ukrainian lands into the Grand Duchy of Lithuania and the Polish-Lithuanian Commonwealth, and analyses the impact of political transformations on the ethnic consolidation of society. Particular attention is paid to the legal aspects of nation-building. The author examines the Statutes of Lithuania as the foundation of legal regulation and the role of Magdeburg law in the development of urban self-government. The consequences of the Unions of Lublin (1569) and Brest (1596) are highlighted, which brought about profound changes in the socio-legal structure and religious life, and led to processes of Polonisation. The study employs historical-legal and comparative methods, which have made it possible to determine the legal status of various social classes (nobility, townspeople, peasants) and its influence on the formation of national identity. The findings of this study emphasise that it was during this period that the foundations of Ukrainian legal culture were laid and the institutional prerequisites for future statehood were formed. It is argued that the legal transformations of the Lithuanian-Polish period became a factor in socio-cultural differentiation and a catalyst for the national self-determination of Ukrainians.

Key words: nation-building, Lithuanian-Polish period, Lithuanian Statutes, Magdeburg Law, Union of Lublin, Union of Brest, legal culture, national identity.

Introduction. The relevance of researching the formation of the Ukrainian nation during the period when Ukrainian lands were part of the Grand Duchy of Lithuania and the Polish-Lithuanian Commonwealth stems from the need for a comprehensive re-examination of the historical and legal processes that had a decisive influence on the development of national identity. It was during this period that profound transformations took place in the political organisation, legal system and social structure of society, laying the foundations for the further development of the Ukrainian nation.

The Lithuanian-Polish period is characterised by the combination of two distinct legal and political traditions – the Lithuanian tradition, based on the principles of preserving local customs and autonomy, and the Polish tradition, which gradually introduced elements of centralised administration and noble democracy. This interaction created unique conditions for the development of the legal culture of the Ukrainian population and the formation of specific features of its national identity.

Particular attention in academic research is paid to the role of legal acts, in particular the Statutes of Lithuania, which became one of the most developed codified legal systems of their time. They not only regulated social relations but also contributed to the preservation of elements of local legal tradition, which was of great importance for the ethnic consolidation of the population of the Ukrainian lands.

Equally significant is the impact of the Union of Lublin of 1569, which led to the incorporation of most Ukrainian territories into the Kingdom of Poland. This brought about substantial changes in the legal system, administrative structure and social relations, which, in turn, influenced the processes of national identity formation.

The relevance of the topic is also determined by contemporary state-building processes in Ukraine, which require a thorough historical and legal analysis of earlier stages of development. Research into the Lithuanian-Polish period allows us to identify the origins of modern legal institutions and understand the historical preconditions for the formation of Ukrainian statehood.

Furthermore, there is growing interest in contemporary scholarship in the issues of nation-building within the context of the interaction between different legal systems and cultural traditions. The Lithuanian-Polish period is a prime example of such interaction, as it was during this time that Eastern Slavic and Western European legal models converged.

Research into this historical period is important not only for reconstructing the past, but also for understanding contemporary processes in the formation of the Ukrainian nation, which accounts for its academic and practical significance.

Main text. The aim of this study is to provide a comprehensive historical and legal analysis of the processes involved in the formation of the Ukrainian nation during the Lithuanian-Polish period, with a focus on the legal, social and cultural transformations that took place in the Ukrainian lands during the 14th–16th centuries. Particular attention is paid to determining the role of legal institutions, in particular the Statutes of Lithuania, Magdeburg law and the Polish legal system, in the formation of the national identity of the Ukrainian population.

Achieving this objective involves addressing a series of interrelated research tasks that will reveal the multidimensional nature of the process under study and its historical and legal character.

The main objectives of the study are:

1. To analyse the historical preconditions for the formation of the Ukrainian nation whilst Ukrainian lands were part of the Grand Duchy of Lithuania and the Polish-Lithuanian Commonwealth.
2. To examine the specific features of the functioning of the legal system of the Grand Duchy of Lithuania and its influence on the development of the legal culture of the Ukrainian population.
3. To identify the role of Polish law and the policy of Polonisation in the transformation of socio-legal relations in the Ukrainian lands.
4. To analyse the socio-legal structure of society and the characteristics of the legal status of various social classes.
5. To assess the influence of religious factors, in particular the Union of Brest, on the formation of legal and national identity.
6. To identify the long-term legal consequences of the Lithuanian-Polish period for the further development of Ukrainian statehood.
7. To summarise the role of legal institutions in the process of forming the Ukrainian nation as a historical-cultural and political-legal phenomenon.

The stated aim and objectives enable a systematic approach to the analysis of nation-building processes and the identification of key legal determinants that influenced the formation of the Ukrainian nation during the historical period under study.

The study of the formation of the Ukrainian nation during the Lithuanian-Polish period is based on a comprehensive interdisciplinary approach that combines historical-legal, socio-cultural, political-institutional and source-based analysis. Such an approach is necessary given the complexity and multidimensional nature of the processes that took place in the Ukrainian lands in the 14th–16th centuries, when legal systems, social structure and cultural-ethnic identities were simultaneously undergoing transformation.

The research material comprises a wide range of historical sources of various origins, which enable the reconstruction of the legal and social reality of the Lithuanian-Polish period.

Legislative acts. This group includes the Statutes of Lithuania (1529, 1566, 1588), acts of the Grand Duchy of Lithuania, privileges granted by Polish kings, Sejm resolutions of the Polish-Lithuanian Commonwealth, as well as town charters regulating the activities of communities. These sources

allow for an analysis of the evolution of legal institutions and the degree of integration of Ukrainian lands into the state-wide legal system (Chaikovskyi et al., 2003).

Historical narrative sources. These include Rus' chronicles, Polish chronicles (in particular the chronicles of M. Stryjkowski), as well as Western European diplomatic and travel accounts. They reflect political events, social processes and relations between ethnic groups, which is important for understanding the context of nation-building (Hrushevsky, 1997).

Archival documents. These include court records, land charters, the records of town and district courts, municipal registers, and documents from ecclesiastical institutions. They enable us to examine the actual functioning of the legal system at the local level and the mechanisms of law enforcement (Yakovenko, 2006).

Academic literature. The study draws on the works of Ukrainian and foreign historians, legal scholars and sociologists who have researched issues of ethnogenesis, state-building and legal transformations in Eastern Europe. Particular attention is paid to contemporary concepts of nation-building and historical memory.

Supplementary sources. This group includes cartographic materials, reconstructions of historical territories, statistical summaries from later periods, as well as electronic academic databases that help clarify the historical and legal context.

The methodological basis of the study is founded on the principles of historicism, objectivity and systematicity, which allows the Lithuanian-Polish period to be considered as a coherent historical and legal phenomenon.

The historical-legal method is applied to analyse the evolution of legal institutions, their transformation and their influence on the formation of social relations. It allows us to trace how legal norms changed through the interaction of Lithuanian, Polish and Ruthenian traditions.

The comparative law method is used to compare different legal systems (Lithuanian, Polish and the local Ruthenian system). This makes it possible to identify common features, differences and the mechanisms of their interaction within a single political and legal space.

The systemic approach allows the legal system to be viewed as a set of interrelated elements – norms, institutions, procedures and social practices. This approach provides a holistic understanding of how society functions.

Source criticism is aimed at the critical study of historical documents, determining their authenticity, the context of their creation and their degree of reliability. This helps to avoid distortions in the reconstruction of historical processes.

The sociocultural method is used to analyse the influence of legal norms on the formation of cultural and national identity, particularly through education, religion, language and social practices.

The institutional approach allows for an examination of the role of state, judicial and religious institutions in shaping the legal order and their influence on processes of social integration.

The application of this combination of methods and sources provides a multi-level analysis of the Lithuanian-Polish period as a crucial stage in the formation of the Ukrainian nation. This makes it possible to reveal not only the formal legal aspects, but also the underlying socio-cultural processes that shaped the development of Ukrainian society.

The state of academic research into the formation of the Ukrainian nation during the Lithuanian-Polish period is characterised by considerable depth and a wide variety of approaches that have emerged in both domestic and foreign historiography. Research into this period is a complex task, as it encompasses the political, legal, social and cultural transformations that took place amidst the integration of Ukrainian lands into various state formations. In contemporary scholarship, this issue is examined through the lens of an interdisciplinary approach, which allows for a comprehensive assessment of the influence of legal institutions on the formation of national identity.

Among Ukrainian researchers, Mykhailo Hrushevsky, Ivan Krypiakevych, Nataliia Yakovenko and Yaroslav Dashkevych have made significant contributions to the study of this issue. In the works of these scholars, particular attention is paid to the historical continuity of the development of Ukrainian lands, the role of legal institutions and the specific nature of socio-political processes during the Lithuanian-Polish period. In particular, it is emphasised that this stage was not an interruption in the development of the Ukrainian statehood tradition, but, on the contrary, became an important period of adaptation and transformation of previous forms of statehood.

Mykhailo Hrushevsky (1955), in his seminal conception of the history of Ukraine-Rus', put forward the idea of the continuity of the Ukrainian people's development, emphasising the role of the Lithuanian state in preserving Rus' legal traditions. Ivan Krypiakevych (Krypiakevych, 1990) viewed this period as a stage in the formation of the social structure of Ukrainian society, emphasising the significance of the legal status of various estates. Natalia Yakovenko (Yakovenko, 2006) devotes considerable attention in her research to cultural and legal aspects, in particular the influence of noble culture and legal norms on the formation of identity. Yaroslav Dashkevych (Dashkevych, 2007) analyses the geopolitical factors in the development of Ukrainian lands.

Contemporary Ukrainian scholars view the Lithuanian-Polish period as a complex and contradictory phase in which processes of integration and differentiation coexisted. On the one hand, local legal traditions and cultural identity were preserved, whilst on the other, the influence of the Polish legal and social model grew stronger. This dualism created the conditions for the formation of new forms of identity that combined elements of different cultural and legal systems.

In foreign historiography, the issue of the formation of the Ukrainian nation during the Lithuanian-Polish period is examined within the broader context of the history of Central and Eastern Europe. Alexander Subtelny, Serhii Plokhy, Paul Robert Magocsi, Timothy Snyder and Norman Davies have made significant contributions to research on this topic. Their works analyse the processes of state-building, legal transformations and cultural changes that took place in Eastern Europe, particularly in the Ukrainian lands.

Oleksandr Subtelny (Subtelny, 2009) emphasises the significance of the Lithuanian-Polish period as a stage in the integration of the Ukrainian lands into the European political and cultural sphere. Serhii Plokhy (Plokhy, 2015) focuses on the processes of identity formation in the context of interaction between different ethnic and religious groups. Paul Robert Magocsi (Magocsi, 2010) regards this period as pivotal for the formation of regional diversity within Ukrainian society. Timothy Snyder (Snyder, 2003) analyses the influence of political structures on the formation of national consciousness, whilst Norman Davies (Davies, 1981) explores the role of the Polish-Lithuanian Commonwealth as a multinational state that created unique conditions for the development of various peoples.

A separate area of research comprises works devoted to the analysis of legal systems from the Lithuanian-Polish period. These studies focus in particular on the Lithuanian Statutes, Magdeburg law and Polish legislation as the primary sources of legal regulation. Researchers emphasise that it was precisely these legal institutions that played a key role in shaping the legal culture and social organisation of the Ukrainian population (Frost, 2015).

At the same time, there are differing approaches in the academic literature to assessing the impact of the Polish factor on the development of the Ukrainian nation. Some researchers highlight the negative consequences of Polonisation, as well as social and religious pressure, which led to increased social differentiation and conflicts. Others, however, emphasise the positive aspects, in particular integration into the European legal space, the development of urban self-government and the formation of new social institutions.

Thus, an analysis of the state of academic research on this issue demonstrates its complexity, multidimensionality and controversial nature. The diversity of approaches adopted by Ukrainian and foreign researchers allows for the formation of a comprehensive understanding of the Lithuanian-Polish

period as a crucial stage in the formation of the Ukrainian nation, one that requires further in-depth historical and legal analysis.

The legal transformations of the Lithuanian-Polish period played a decisive role in the formation of Ukrainian identity, as it was during this time that new forms of legal regulation were taking shape, influencing the social structure, cultural processes and political organisation of society. The integration of Ukrainian lands into the Grand Duchy of Lithuania, and later the Polish-Lithuanian Commonwealth, facilitated the inclusion of the local population within a broader legal and institutional framework that combined elements of East Slavic and Western European traditions.

One of the key factors in the formation of legal identity was the preservation and development of Rus' law within the Lithuanian state. The Lithuanian Statutes, which codified the norms of customary law, ensured legal continuity and the stability of social relations (Yakovenko, 2006). They served not only as a regulatory instrument but also as a means of preserving the legal identity of the Ukrainian population, which was of great importance for fostering a sense of belonging to a specific legal community.

With the transfer of Ukrainian lands under the rule of the Kingdom of Poland, significant changes took place in the legal system. The spread of Polish legislation, in particular the norms of noble law, contributed to the formation of new social and legal hierarchies. During this period, local legal traditions were gradually supplanted and replaced by Polish norms, accompanied by processes of Polonisation and a shift in the socio-cultural identity of part of the population.

A key element of these legal transformations was the introduction of Magdeburg law, which facilitated the development of urban self-government. It created the conditions for the emergence of new social groups–the bourgeoisie–which played a significant role in the development of economic life and the spread of European legal standards (Bilous, 2008). It was within the urban environment that elements of civic identity took shape, combining legal, economic and cultural aspects.

The religious factor, which was closely intertwined with legal processes, played a distinct role in the formation of identity. The Union of Brest in 1596 led to a change in the legal status of the Orthodox Church and the creation of a new confessional structure, which influenced social relations and the self-identification of the population (Plokhy, 2001). Confessional differences became an important element of social differentiation and, at the same time, a factor in the consolidation of certain population groups.

Processes of socio-legal stratification also had a significant influence on the formation of Ukrainian identity. The serfdom of the peasantry, the growing role of the nobility, and the restriction of the rights of other social groups contributed to the formation of a specific social structure that determined the nature of social relations. In these circumstances, legal norms served not only as a tool for regulation but also for social control, which influenced the formation of collective consciousness.

At the same time, it is worth noting that these legal transformations were not merely restrictive in nature, but also served to modernise the legal system. Integration into the European legal sphere contributed to the spread of new legal ideas, the development of institutions of self-government, and the formation of a legal culture. This laid the groundwork for the further development of the Ukrainian nation as part of European civilisation.

The legal transformations of the Lithuanian-Polish period became one of the key factors in the formation of Ukrainian identity. They determined the main directions of development of legal culture, social structure and the political organisation of society, which subsequently influenced the processes of nation-building and state-building in Ukraine.

The formation of the Ukrainian nation during the Lithuanian-Polish period has deep historical roots, dating back to the decline of Kievan Rus' and the subsequent political disintegration of the East Slavic lands. The Mongol invasion of the 13th century led to the destruction of a unified political centre and resulted in the formation of new centres of power, which paved the way for the incorpo-

ration of Ukrainian territories into neighbouring states, in particular the Grand Duchy of Lithuania (Subtelny, 2009).

The incorporation of Ukrainian lands into the Grand Duchy of Lithuania in the 14th century took place in a relatively peaceful manner and was accompanied by the preservation of a significant portion of local political and legal traditions. The Lithuanian authorities, guided by the principle of 'do not disrupt the old, do not introduce the new', ensured the autonomy of the Ruthenian lands, which contributed to the preservation of their cultural and legal identity. This created favourable conditions for the gradual development of the ethnic unity of the Ukrainian population (Yakovenko, 2006).

The political integration of the Ukrainian lands into the Lithuanian state was accompanied by the formation of a new administrative system, which combined local traditions of governance with elements of centralised authority. The Rus' language was used as the language of official business, which contributed to the preservation of cultural unity and legal continuity. Such a policy ensured relative stability and fostered the development of social institutions.

Socio-economic changes also played an important role in creating the conditions for nation-building. The development of feudal relations, the growth of towns and the expansion of trade contributed to the formation of new social groups, notably the nobility and the bourgeoisie. These groups became the bearers of new legal and cultural values, which gradually transformed society.

Geopolitical factors had a significant influence on the formation of the Ukrainian community. Ukrainian lands found themselves at the crossroads of Eastern and Western influences, which determined their role as a contact zone between different civilisational models. Interaction with European states contributed to the spread of new political and legal ideas, whilst the preservation of their own traditions ensured the continuity of historical development (Huntington, 1996).

Following the conclusion of the Union of Krewo in 1385 and the subsequent rapprochement between Lithuania and Poland, a new phase in the development of the Ukrainian lands began. The strengthening of Polish influence gradually transformed the political and legal system, creating new challenges for the preservation of local identity. At the same time, these processes facilitated the integration of Ukrainian lands into the European political sphere (Plokhy, 2016).

The historical preconditions for the formation of the Ukrainian nation during the Lithuanian-Polish period were determined by a combination of factors: political integration, socio-economic changes, and cultural and legal continuity. It was these factors that laid the foundation for the subsequent processes of nation-building, which unfolded amidst the complex interplay of various state and legal systems.

The legal system of the Grand Duchy of Lithuania became one of the key factors that shaped the development of the Ukrainian lands in the 14th–16th centuries and had a significant influence on the formation of the Ukrainian nation. Its defining feature was the combination of Old Russian legal traditions with new elements of state administration, which ensured relative stability in social relations and helped preserve the cultural and legal identity of the local population.

One of the most important sources of law during this period were the Lithuanian Statutes – codified collections of laws that systematised the norms of customary law, princely decrees and judicial practice. The adoption of three editions of the Statute (1529, 1566, 1588) testifies to the high level of development of legal thought and the desire to regulate social relations. A distinctive feature of these documents was that they were largely based on Ruthenian law and took local traditions into account, which ensured their acceptance by the population of the Ukrainian lands (Yakovenko, 2006).

An important aspect of the functioning of the legal system of the Grand Duchy of Lithuania was the preservation of customary law as a key source for regulating social relations. It complemented written law and ensured the flexibility of the legal system, allowing for regional characteristics and social conditions to be taken into account. It was precisely this interaction between written and customary law that contributed to the formation of a specific legal culture, which combined traditional and new elements.

The judicial system also played an important role in the development of legal relations. Various types of courts operated in the Grand Duchy of Lithuania–princely, regional, town and district courts–which heard cases in accordance with their respective jurisdictions. This contributed to the development of legal practice and helped shape the population's understanding of legality and justice as the foundations of social order.

Particular attention should be paid to the legal status of different social groups. The nobility enjoyed significant privileges, which cemented its leading role in the political life of the state. At the same time, the rights of townspeople and peasants were more limited, which created social inequality and determined the nature of social relations. However, even under these conditions, the legal system ensured a certain level of regulation of interaction between the different estates (Plokhy, 2016).

An important factor in the legal system's influence on the formation of Ukrainian identity was the use of the Rus' (Old Ukrainian) language in official correspondence and judicial proceedings. This contributed to the preservation of cultural heritage and the formation of a sense of community among the population of the Ukrainian lands. The language of law served not only as a means of communication but also as an element of cultural self-identification (Nimchuk, 2015).

Furthermore, the legal system of the Grand Duchy of Lithuania facilitated the integration of Ukrainian lands into the wider European legal sphere. It combined elements of Roman, canon and customary law, thereby laying the foundations for the development of legal institutions characteristic of Western Europe.

Thus, the legal system of the Grand Duchy of Lithuania played an important role in the formation of the Ukrainian nation, ensuring the preservation of legal traditions, the development of social institutions and integration into the European legal space. Its influence was evident in the formation of legal consciousness, social structure and cultural identity among the population of the Ukrainian lands.

Polish influence on the Ukrainian lands significantly increased following the conclusion of the Union of Lublin, which marked a turning point in the development of the region's legal and political systems. As a result of this union, a significant part of Ukrainian territories came under the direct rule of the Kingdom of Poland, leading to profound changes in the spheres of governance, law and the social structure of society (Yakovenko, 2006).

One of the key consequences was the gradual spread of Polish legislation and legal institutions. The Polish legal system was based on the principles of noble democracy, which provided extensive political rights for the nobility but at the same time restricted the participation of other social groups in state administration. This led to a change in the legal status of the local elite, who were forced to integrate into the Polish political system by adopting its norms and values.

An important aspect of the transformation was the gradual replacement of the norms of the Lithuanian Statutes by Polish law, although in practice this process was protracted and uneven. In many regions of the Ukrainian lands, traditional legal norms continued to apply, indicating a certain resilience of the local legal culture. However, the general trend was towards a strengthening of the influence of Polish legal institutions, which altered the structure of legal relations (Yakovenko, 2006).

A key factor in these changes was the policy of Polonisation, which encompassed not only the cultural but also the legal sphere. The adoption of the Polish language, the Catholic faith and the noble way of life became a prerequisite for maintaining social status and access to political rights. This contributed to the formation of a new identity among a section of the Ukrainian elite, which gradually integrated into Polish society (Plokhy, 2016).

At the same time, social differentiation was deepening. The Polish legal system helped to consolidate the privileged position of the nobility and increase the dependence of the peasantry. The processes of serfdom became systematic, which significantly restricted the rights of peasants and determined their socio-economic dependence. This had long-term consequences for the development of Ukrainian society and the formation of its social structure.

Another important element of legal transformations was the spread of Magdeburg Law, which facilitated the development of urban self-government and contributed to the formation of new social groups (Markevych, 2021). Towns were given the opportunity to resolve internal matters independently, which contributed to the development of the economy, trade and crafts. New legal practices and elements of civic culture took shape in the urban environment.

At the same time, Polish influence also had certain positive aspects. Integration into the legal system of the Polish-Lithuanian Commonwealth opened up access to European legal ideas and contributed to the development of education, culture and legal thought. This created the conditions for the formation of a more complex and multidimensional national identity that combined elements of various traditions.

Polish influence during the Lithuanian-Polish period was of a contradictory nature. On the one hand, it contributed to the transformation of the legal system, the integration of Ukrainian lands into the European sphere, and the development of new institutions. On the other hand, it led to increased social inequality, Polonisation, and the loss of some of the traditional legal autonomy. Taken together, these processes constituted an important stage in the formation of the Ukrainian nation and its legal culture.

The socio-legal status of the population of the Ukrainian lands during the Lithuanian-Polish period was characterised by a complex hierarchical structure, shaped by a combination of local traditions and imported Polish-Lithuanian legal norms. During this period, society was clearly divided into estates, each of which had a different scope of rights, duties and legal privileges, which determined the nature of social relations and influenced the processes of national identity formation.

The highest social status belonged to the szlachta, which gradually became the leading political class of the Polish-Lithuanian Commonwealth. The nobility enjoyed extensive property, political and judicial privileges, including the right to participate in the Sejm, to elect the king and to enjoy personal immunity. This contributed to the formation of a corporate noble culture, which largely determined the political development of the state and influenced the legal system as a whole (Yakovenko, 2006).

The burghers occupied an intermediate position within the social structure. Their legal status was largely determined by Magdeburg law, which guaranteed municipal self-government, judicial autonomy and the regulation of economic activity. The burghers were an important economic element of society, contributing to the development of crafts, trade and urban culture. At the same time, their political rights remained limited compared to those of the nobility (Markevych, 2021).

The peasantry constituted the largest social group, but was also the most legally restricted. During the period of the gradual intensification of feudal relations, the serfs were bound to the land, which significantly restricted their freedom of movement, property rights and participation in public life. This entrenchment of dependency had long-term consequences for the socio-economic development of the Ukrainian lands.

The legal system of the time entrenched inequality between social classes, yet at the same time ensured a certain level of legal regulation and stability. The Lithuanian Statutes and Polish legislation formed the regulatory framework that defined the rights and obligations of various population groups. This helped to organise social relations, although it also entrenched social stratification (Yakovenko, 2006).

An important element of the socio-legal system was the system of obligations, which regulated economic and labour relations between the various social classes. The peasantry performed numerous obligations for the benefit of the landowners, whilst the nobility enjoyed significant economic privileges. This system ensured the functioning of the feudal economy, but at the same time restricted social mobility.

The Church played a special role in the socio-legal structure, possessing its own jurisdiction and exerting significant influence on social relations. Religious institutions served not only as spiritual centres but also as important legal entities that regulated part of social relations and influenced the formation of moral and legal norms (Matseliukh, 2018).

The socio-legal status of the population of the Ukrainian lands during the Lithuanian-Polish period was characterised by a complex system of class division, legal inequality and the gradual transformation of social relations. These processes were of great significance for the formation of the Ukrainian nation, as they determined the structure of society, the nature of legal relations and the development of social consciousness.

During the Lithuanian-Polish period, the religious factor played a key role in the transformation of socio-legal relations and the formation of Ukrainian identity. The conditions of religious pluralism that developed in the Ukrainian lands were the result of the interaction between the Orthodox tradition of Kievan Rus' and the Catholic influence of the Polish-Lithuanian Commonwealth, which gradually intensified following the region's political integration into the Polish-Lithuanian state.

For a long time, the Orthodox Church remained an important bearer of cultural and legal heritage, ensuring the preservation of traditional norms of social life. It performed not only a spiritual function but also acted as an institution regulating part of social relations, shaping the moral and legal standards of the population's behaviour. In this context, the Church acted as a factor in the preservation of ethnic and cultural identity.

Following the conclusion of the Union of Brest, the confessional situation became significantly more complex, which had direct legal consequences. The establishment of the Greek Catholic Church led to a split within the Orthodox community and the formation of a new ecclesiastical-legal structure, which was subordinate to the See of Rome but retained the Eastern rite. This gave rise to conflicts regarding jurisdiction, property and church administration (Matseliukh, 2018).

The Catholic Church, supported by the Polish authorities, gradually expanded its influence across Ukrainian lands. It was granted privileges in the spheres of education, land ownership and political representation, which intensified processes of religious and social differentiation. This, in turn, affected the legal status of various religious groups and created unequal conditions for their development (Plokhy, 2016).

Religious changes had a direct impact on the legal system, as religious affiliation determined access to certain rights and privileges. The Orthodox population often found itself in a less favourable legal position compared to Catholics, which intensified social tensions and contributed to the formation of protest movements. Thus, the religious factor became an important element of the legal stratification of society.

At the same time, religious life contributed to the preservation of cultural heritage and the development of education. Monasteries and brotherhoods served as centres of scholarship, education and legal thought, preserving the traditions of Kievan Rus' culture. They played an important role in shaping collective memory and national consciousness, which had a long-term impact on nation-building processes.

From a legal perspective, religious institutions had their own system of jurisdiction, which governed matrimonial and family relations, moral norms and certain property disputes. This gave rise to parallel legal systems that interacted with one another and formed a complex structure of legal regulation within society (Yakovenko, 2006).

The religious factor during the Lithuanian-Polish period had a multifaceted influence on the formation of the Ukrainian nation. It not only shaped the spiritual life of society but also directly influenced the legal system, social structure and processes of cultural identification among the population of the Ukrainian lands.

The results of the study indicate that the legal systems of the Lithuanian-Polish period had a decisive influence on the formation of the Ukrainian nation as a complex historical-legal and socio-cultural phenomenon. First and foremost, it should be noted that it was precisely during the period when the Ukrainian lands were part of the Grand Duchy of Lithuania and the Polish-Lithuanian Commonwealth that a fusion of three legal traditions–Rus', Lithuanian and Polish–took place, creating a unique legal model for the region.

An analysis of the sources suggests that the Statutes of Lithuania served as a key instrument in preserving the legal continuity of the Old Russian tradition. They not only codified existing norms but also adapted them to new political conditions, thereby ensuring the stability of the legal order. This contributed to the development of a sense of legal continuity among the population of the Ukrainian lands.

At the same time, the gradual strengthening of Polish influence following the Union of Lublin led to the transformation of the legal system towards unification and centralisation. Polish law, centred on the privileges of the nobility, altered the balance of social relations, strengthening the role of the nobility and restricting the rights of other estates. This created new socio-legal conflicts that influenced the development of public consciousness.

A particularly important finding is that the legal system performed not only a regulatory but also an identificatory function. The use of the Rus' language in official correspondence, the preservation of local legal norms and the functioning of traditional judicial institutions contributed to the formation of a specific legal culture, which became one of the elements of Ukrainian national identity (Nimchuk, 2015).

The study also shows that the development of Magdeburg law in the urban centres of the Ukrainian lands contributed to the formation of elements of civil society. Towns became hubs of legal autonomy, economic activity and cultural development, which had a positive impact on the processes of social modernisation.

It should be emphasised separately that the religious factor, combined with legal changes, had a significant influence on the formation of identity. Confessional transformations, particularly following the Union of Brest, led to the emergence of new legal regimes for various religious groups, which intensified social differentiation but at the same time contributed to the consolidation of the Orthodox population.

The findings suggest that the legal systems of the Lithuanian-Polish period were not only an instrument of governance but also a key factor in the formation of the Ukrainian nation. They shaped the social structure, regulated relations between social classes, and influenced the processes of cultural identification among the population.

Further analysis shows that the formation of the Ukrainian nation during the Lithuanian-Polish period took place not only under the influence of legal institutions, but also in close connection with socio-economic and cultural transformations. These processes interacted with one another, creating a complex system of factors that shaped the development of Ukrainian society and its identity.

One of the key findings is that the development of feudal relations and the gradual enslavement of the peasantry significantly altered the social structure of society. The growing economic dependence of peasants on landowners led to increased social stratification, which, in turn, influenced the formation of different levels of social consciousness and collective identity.

At the same time, the development of urban centres contributed to the formation of new social groups, in particular the bourgeoisie, which played an important role in the dissemination of legal and cultural innovations. Towns became centres of trade, crafts and education, which contributed to the formation of a more dynamic social environment and the development of elements of early civic culture.

The cultural transformations of this period were also of significant importance to the processes of nation-building. The spread of literacy, the development of education within church and municipal institutions, and the operation of brotherhood schools contributed to the preservation and transmission of cultural heritage. This helped maintain links between different social groups and foster a shared cultural space (Yakovenko, 2006).

Particular attention should be paid to the influence of religious institutions on socio-economic processes. The Church acted not only as a spiritual centre, but also as a significant landowner and participant in economic relations. This ensured its influence on the social structure of society and allowed it to shape moral, ethical and legal norms of behaviour (Matseliukh, 2018).

An important finding of the study is the establishment that cultural interaction between the Ukrainian, Polish and Lithuanian populations was of a dual nature. On the one hand, there was integration into the wider European cultural space; on the other, processes of preserving local identity and traditions were strengthened.

The socio-economic and cultural transformations of the Lithuanian-Polish period served as an important complement to legal processes and, together with them, formed the multidimensional foundation of the Ukrainian nation. They influenced the structure of society, the value system and the mechanisms of self-identification among the population.

The final stage of the analysis establishes that the Lithuanian-Polish period had long-lasting legal consequences, which largely determined the further development of Ukrainian statehood and national identity. First and foremost, it should be noted that the legal tradition formed during this period became the basis for subsequent institutional transformations in the Ukrainian lands.

One of the key findings is the identification of legal continuity between the provisions of the Lithuanian Statutes and the subsequent legal systems that operated on the territory of Ukraine. Despite changes in political regimes, many legal principles, particularly in the areas of the administration of justice, land relations and local self-government, remained relevant and influenced the formation of legal culture (Yakovenko, 2006).

An important long-term consequence was the consolidation of the estate-based principle of social organisation, which shaped the social structure for centuries to come. Whilst this system provided a degree of stability, it simultaneously restricted social mobility and fostered specific patterns of social behaviour that influenced the development of public consciousness.

The impact of legal transformations on the development of local self-government deserves special mention. Magdeburg Law, which was actively applied in towns, became a key element in the formation of traditions of autonomous governance that persisted into subsequent historical periods. This contributed to the development of elements of legal self-awareness and civic culture (Markevych, 2021).

Religious and legal changes also had a long-term impact on the formation of Ukrainian identity. The confessional division, which intensified after the Union of Brest, laid the foundations for the enduring existence of various models of cultural and legal self-identification, which persisted into subsequent centuries.

Overall, the findings of the study confirm that the Lithuanian-Polish period was not only a phase of political integration of the Ukrainian lands, but also a pivotal period in the formation of the legal and socio-cultural foundations of the Ukrainian nation. It was during this time that the structural elements were established which shaped the development of Ukrainian society in subsequent historical eras.

The long-term legal consequences of this period manifested themselves in the formation of legal traditions, social institutions and cultural models that became an integral part of the historical development of the Ukrainian nation.

Conclusions. This study allows us to draw general conclusions regarding the role of the Lithuanian-Polish period in the formation of the Ukrainian nation and its legal foundations. An analysis of historical-legal, socio-economic and cultural processes demonstrates that this period was one of the key stages in the formation of Ukrainian identity and the development of the institutional foundations of society.

Firstly, it has been established that the integration of Ukrainian lands into the Grand Duchy of Lithuania ensured the preservation of a significant part of Old Russian legal traditions. The Lithuanian Statutes served as an important instrument for the codification of law and contributed to legal stability, which had a positive impact on the development of social relations.

Secondly, it has been demonstrated that following the Union of Lublin, significant transformations took place in the legal system under the influence of Polish law, leading to changes in the social structure and the strengthening of class relations. This contributed to the formation of new models of political and social organisation within society.

Thirdly, it has been established that socio-economic processes–in particular, urban development, the serfdom of the peasantry and the emergence of the nobility system–had a significant impact on the formation of the social hierarchy and the collective consciousness of the population in the Ukrainian lands.

Fourthly, it has been established that the religious factor, particularly following the Union of Brest, became an important element of social differentiation and, at the same time, an instrument for preserving cultural identity, which influenced long-term nation-building processes.

Fifthly, it has been demonstrated that the legal institutions of the Lithuanian-Polish period had a long-lasting influence on the formation of Ukrainian legal culture, in particular through the development of local self-government, the judicial system and legal traditions.

Thus, the Lithuanian-Polish period should be regarded as a fundamental stage in the formation of the Ukrainian nation, which determined the key legal, social and cultural parameters of its subsequent development.

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DOI https://doi.org/10.30525/2592-8813-2026-2-8

THE GENESIS OF THE CHRISTIAN CONCEPT OF JUST WAR IN THE POLITICAL AND LEGAL DOCTRINE OF AMVROSII MEDIOLANSKYI

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Abstract. In this article, the authors examine the issues of war and peace, combining the concepts of war and justice, opening the discourse on 'just war' in the works of the outstanding Roman philosopher, lawyer, theologian, statesman and church leader Ambrose of Milan (c. 339/340-397). Analysing his works, the authors reveal how Ambrose formulated the principles of justice in the context of war, emphasising the importance of moral and ethical aspects in military conflicts. The study also focuses on the relationship between religious beliefs and legal norms that influenced the formation of the concept of 'just war' in the ancient world. The article offers an in-depth analysis of Ambrose of Milan's influence on the development of legal and moral ideas about war, as well as his contribution to the formation of a Christian approach to justice in military affairs. The authors explore how his ideas can be applied to contemporary conflicts, offering new perspectives for understanding the ethics of war in the context of global challenges. Thus, the article not only contributes to the study of the philosophy of war, but also opens new horizons for research on justice in military conflicts in the modern world.

Key words: Ambrose of Milan, 'just war,' political and legal discourse, Roman Empire.

Introduction. The problem of war and peace is traditionally considered one of the 'evergreen' topics in the history of political and legal teachings. Developed within the framework of legal, political, sociological and historical sciences as much as possible, military issues, as well as the question of the use of violence and its restriction by law in interpersonal relations, have long been of concern to philosophers, lawyers, politicians and social scientists. Due to the extremely high conflict potential of social life, this issue has a particularly pronounced pragmatic orientation, as evidenced by the active development of modern international humanitarian law, whose important task is considered to be 'focusing attention on the legal dimension of war and related phenomena, on the problems of its limitation, on procedural guarantees to mitigate the destructive consequences of armed conflicts' (Behrouz, 2023).

Particularly noteworthy in this context are concepts that justify the conditions and procedural guarantees for the lawful use of force, limit it, and argue for the combination of the concepts of war and justice, thereby opening up the discourse on 'just war.' Usually, the topic of just war increasingly penetrates scientific and social discourse in times of profound social change, growing conflict, and the ignition and escalation of armed conflicts. In this sense, the study of the origins of the concept of just war can hardly be overestimated. It naturally belongs to the number of normative-axiological concepts on which the efforts of peoples and states are based to curb the 'demons of war' and introduce certain normative safeguards into the conduct of wars that would eliminate (or at least minimise) manifestations of uncontrolled violence and prevent excessive casualties among the civilian population.

In justifying the conduct of war, authors often refer to the classics of the theory of 'just war' by Plato, Aristotle, Cicero, Aurelius Augustine, Thomas Aquinas, H. Grotius, E. de Vattel and other classics (Poda, 2016). At the same time, they ignore the genesis of the concept of just war, which in the late Roman period was linked to the synthesis of the traditional political and legal heritage of Ancient Rome and Christian doctrine. The author of this synthesis and, accordingly, the founder of the concept of just war in Christian political and legal discourse was the outstanding Roman philosopher, theologian, lawyer, statesman and church leader Ambrose of Milan (c. 339/340 – 397). Scholars often associate his name not only with the beginning of the 'just' (legal-centred) trend in understanding the problems of war, but also with the creation of a solid ideological basis for the continuation of this intellectual trend in the works of his student Aurelius Augustine (354-430), as well as in the works of prominent later medieval thinkers (Isidore of Seville, Gratian, Thomas Aquinas, etc.).

Main text. The aim of the study is to prove the unique intellectual contribution of Ambrose of Milan to the development of the concept of just war in the history of European political and legal thought based on Christian doctrine and to analytically identify the key elements of this concept in the context of the state-legal and intellectual development of the late Roman Empire.

The teachings of Ambrose of Milan in general and his ideas of just war in particular have attracted the attention of a large group of foreign experts, whose attention is focused on various aspects of his philosophical, theological, political and legal thought. These include, first and foremost, the works of L. Arnold, R. Beinton, A.J. Bellamy, R.L. Wilken, A. Downnton-Feyer, I.J. Davidson, V.I. Daly, J. Johnson, J. Kadu, J. Kalantzis, D. Klug, K. Corino, C.E. Curran, A. Lennox-Coningham, H. Litzman, J.I. Macdonald, N. Maclean, J. Moorhead, A. Paredi, B. Ramsay, D. Rodin, F. Russell, L.J. Swift, J. Sebayn, R. Sorabji, D. Whiteman, P. Frost, A. Holmes, T. Shannon, and others. The main directions of their research focus on two opposing ideas: either proving the uniqueness of Ambrose of Milan's contribution to the conceptualisation of just war against the backdrop of the development of Christian discourse, or justifying the secondary nature of his ideological contribution, in particular in comparison with the ideas of M.T. Cicero (106-43 BC) (Cicero, 2021), which the Bishop of Milan creatively used in his works, in particular in his leading work, On the Duties of Clerics (Ambrose, 1896). At the same time, for example, N. Maclean noted that Ambrose's political and ideological influence significantly distinguished him from his contemporaries in the Church, and his name carried considerable weight in the circles of Roman senators, courtiers and military leaders (McLynn, 1994). R. Beinton argues that Ambrose was the first to attempt to formulate a Christian ethic of just war, having no doubt about the necessity of Christians fulfilling their military duty and performing military service (Bainton, 1979: 89). L. Swift argues that Ambrose's attitude towards war and violence was greatly influenced by Roman feelings of justice, loyalty, courage and civic responsibility, and that the participation of Christians in the war was justified because they were defending their faith and the empire (Swift, 1970).

Compared to foreign political and legal studies, Ukrainian science has not yet sufficiently explored the contribution of Ambrose of Milan to the development of the concept of just war. His theological ideas began to be studied by the classic of the Ukrainian Renaissance, M. Smotrytsky (1577–1633) (Shchepanskyi, 2015). It was these ideas that attracted the most attention from philosophers and theologians, while the political and legal elements of his legacy, especially those related to military-political and military-legal issues, were virtually ignored by domestic scholars. Thus, it must be noted that there are no special scientific studies in this area.

In general, contemporary scientific research on the issue of just war in Ukraine is characterised by a certain denial (or, more precisely, ignorance) of Ambrose of Milan's contribution to the development of this concept. For example, in the only special dissertation study in Ukrainian science today, by I. Panafidin, which is entirely devoted to the evolution of the idea of just war, the ideas of Ambrose of Milan are not considered at all (Panafidin, 2014), although the author quite rightly notes that 'the

natural law concept of just war appears in the philosophical tradition of Ancient Rome' (Panafidin, 2014: 65). Another domestic researcher, R. Kokhanchuk, notes in one of his publications that the first to expound a systematic Christian doctrine of war, which he partially learned from his teacher, Bishop Ambrose of Milan, was Aurelius Augustine (Kokhanchuk, 2003: 26). In another publication, the author notes that the concept of a 'just war' emerged only in the Middle Ages. Although Soviet sources, in his opinion, claim that its ideological premises were laid down in Augustine's works, the phrase 'just war' was first used by Pope Stephen III in his letter to the Frankish magnates (753) (Kokhanchuk). However, this is not the case, because in fact the term just war first appears in Aristotle (384-322 BC) in his work Politics and is used to describe the wars waged by the ancient Greeks 'in the name of spreading culture and civilisation' against non-Greeks, as they were considered savages and barbarians (Semchynskyi, 2004: 95). Finally, some domestic researchers tend to attribute the development of the theoretical basis of the idea of a just war to the Middle Ages and even the early modern period (for example, L. Moiseenko believes that this idea 'was actively developed in the context of the Crusades, the Reconquista in Spain and the Ottoman invasion of Europe' (Moiseyenko, 2018: 550)).

Instead, only isolated elements of the rich political and legal heritage of Ambrose of Milan (Ambrose, 1896) have been studied in the works of O. Borisova, O. Butkevych, V. Korniyenko, R. Kokhanchuk, K. Lukyanenko, O. Radzivill, K. Semchynsky, M. Finkievich, and Z. Yudin. However, even among these authors, only K. Lukyanenko directly states that the ideas of Ambrose of Milan (along with the ideas of his student Augustine) 'actually create the doctrine of just war' (Lukyanenko, 2022: 162).

Thus, the unsatisfactory (for domestic science) state of research into Ambrose of Milan's contribution to the development of the concept of just war demonstrates the need for a comprehensive objective analysis of his ideas, which has both purely scientific historical and legal grounds and relevant political and legal grounds.

Traditionally, in the history of European political and legal thought, it is believed that the concept of just war has acquired various ideological implications and undergone significant modifications throughout its evolution and changes in the intellectual 'climate' (Johnson, 2009). In the context of our study, it is particularly important to emphasise that against the backdrop of the Roman theory of just war, in which force was considered the legitimate right of the state, and the Old Testament (Jewish) tradition of divinely sanctioned war, early Christians unreservedly accepted the radical pacifism of Jesus' teaching that hatred should be repaid with love; one should love one's enemies (Zagrebelny). Jesus directly advises St. Peter to put away his sword in the Garden of Gethsemane; commands his followers to turn the other cheek if struck on the right; promises that those who live by the sword will perish by it. "The Gospel gives love for enmity, kindness for hatred, prayers for curses, help for the persecuted, patience for the hungry, and the grace of reward. How much more perfect is the athlete who feels no injury!" (Love your enemies)

Jesus' Sermon on the Mount and St. Paul's Epistle to the Romans seem to advise detachment from the political sphere, perhaps because the coercive roles of warrior, jailer, lawyer, tax collector, and judge are incompatible with the radical demands of following the commandments of God, who responds to sin with love and allows the sun to shine equally on the heads of the wicked and the good. Therefore, literally following the teachings of Jesus Christ, early Christians tried to create separate, self-sufficient communities in which all were brothers and sisters in faith and where the only direct form of coercion was social isolation. Instead, the participation of believers in Roman life required behaviour that clearly contradicted Jesus' preaching, as it involved oaths of allegiance to the Roman emperor and worship of the Roman gods, and also exposed Christians to the general moral depravity associated with military life and military service. The combination of pacifism with the use of force in war became an increasingly pressing issue as the Roman Empire became Christianised, especially in the period after the Edict of Milan (313) (Popsuenko, 2009) was issued by Emperor Constantine I the Great (306-337). This momentous event forced the leaders of the Christian Church to face a new

set of political responsibilities that early Christian communities could afford to reject. In addition to inheriting all the coercive organs of the state – and the associated bureaucracies, cultures and professional classes – there was a theological conviction that the social stability recommended by St. Paul was no longer justified by the inevitability of Christ's return, and that in fact the current Christian era would last indefinitely (Johnson, 1991: 9). The Pax Romana provided a solid material basis for the profession and spread of Christianity by proclaiming the empire Christian (Omelchuk, 2011: 244–246). But in return, the empire demanded obedience and service from Christians, which meant participation in wars waged by emperors both on the periphery of the empire and within it against usurpers. Meanwhile, Christians were often accused of showing sympathy for their enemies (War and Christian Ethics, 2005: 55), which directly contradicted Roman ideas about legalism in relation to public authorities and loyalty to the emperor. With the intensification of barbarian pressure on the borders of the Roman Empire and the complication of the military-political situation within the empire in the second half of the 4th century, non-resistance to evil in the form of barbarians seeking to capture parts of the empire and settle there directly undermined the state's defence capability from within. Therefore, these circumstances exacerbated the need to reconcile the ruling legal consciousness, inspired by traditional Roman virtues, with pacifist Christian attitudes.

Thus, it was precisely the complex military and political situation that objectively required the harmonisation of Roman models of warfare with the prevailing Christian doctrine. This reconciliation had to combine the legalised view of war since Cicero (based on the idea of the dominance of justice and law in public and state life) with the latest trends in limiting violence promoted by Christianity. Such a synthesis of ideas, leading to a broad justification of the concept of just war, was proposed by Ambrose of Milan in the second half of the 4th century.

Ambrose, who came from a wealthy patrician family in Trier (Trier), first held the position of lawyer in Dalmatia, then prefect of the province of Emilia-Liguria with his residence in Mediolanum (now Milan). Due to the religious struggle between Orthodox Christians and Arians, he, as an uninvolved person, not even baptised yet, was recommended for the position of bishop of Milan by the Roman emperor Valentinian I (374). After being baptised and ordained as bishop, Ambrose donated his vast wealth to the church and took a vow of non-profit, which he kept throughout his pastoral ministry (Radziwill, 2017: 141).

J. Sebain and T. Torson place Ambrose alongside two other prominent theologians of the late empire, St. Augustine and St. Gregory, noting that "none of them set themselves the task of developing a systematic church philosophy and formalising the relationship between the church and the state; these figures belonged rather to the period of the formation of Christian thought, they dealt with issues of primary importance at the time" (Sebein George, Thorson Thomas, 1997: 188). As the oldest representative of this 'trinity,' Ambrose formulated views that became the foundation of Christian beliefs and an integral part of the Christian concept of the relationship between the state and the church as a cross-cutting issue in the further political and legal development of Europe (Sebein George, Thorson Thomas, 1997: 188).

Ambrose became not only the bishop of one of the largest cities of the empire, but also one of the most influential figures in the ancient Roman imperial hierarchy, advising emperors Valentinian I (364-375), Gratian (375-383) and Theodosius I the Great (379-395) [30, XIII], who, under Ambrose's influence, fought against paganism in the Empire, adopting the principles he had declared: recognition of the independence of the church from the state in its own sphere, recognition of the role of the church as a model of morality and its right to protection by the state (Kornienko, 2014). It should not be thought that in this respect he differed in any way from other Christians of his time, but the very nature of the formulation of his beliefs and his unwavering fidelity to them in the face of his opponents made Ambrose an indisputable moral authority for subsequent generations of Christian authors, who referred to him in their works. Ambrose himself unequivocally stated that in spiritual matters,

the church has jurisdiction over all Christians, including the emperor, because the emperor, like any other Christian, is a child of the church, that is, 'is within the church, not above it' (Sebein George, Thorson Thomas, 1997: 188).

The bishop openly challenged state violence in 390, when a mob killed a Roman commander in Thessaloniki, and thousands of people were subsequently killed in response. The bishop condemned the massacre and forced Emperor Theodosius I to publicly repent (Lenox-Conyngham, 2005). Thanks to this symbolic gesture, what had once been simply the prerogative of the state—its monopoly on violence to secure its monopoly on power—was elevated to a moral principle that constrained not only ordinary people but the state itself.

Ambrose, like some earlier Christian thinkers (Eusebius of Caesarea, Athanasius the Great), realised that it would be foolish for the empire not to support Christianity, which promoted obedience to the emperor's authority. At the same time, Christianity, as the religion of the empire, had to find a way to legitimise war if it wanted to maintain its position at the centre of the state. For Ambrose, the transition from radical pacifism to the legitimisation of war was a fairly easy step. In his opinion, when speaking of non-resistance to evil, Jesus was referring only to a specific individual when he forbade killing others for self-defence. However, nowhere in his sermons did he deny the protection of others – the weak and defenceless. Thus, the rule of 'turning the other cheek' was an internal inclination of the heart, not a rule of external human behaviour (Bellamy, 2006: 24). According to Ambrose, a true Christian could use violence only to protect others, not for self-defence. The next step taken by the thinker was to declare all citizens of Rome as needing protection and to equate the protection of the empire with the protection of its population and the Christian faith.

The second criterion for justifying the war for Ambrose was the establishment of the image of the empire as the only refuge for believers, a Christian fortress surrounded by enemies on all sides, the defence of which is clearly a godly cause, since the survival of the Christian faith and the possibility of its spread to other lands depend on it. Thus, his definition of 'Christian love' required the protection of Christian society, in particular that which he considered orthodox (The Ethics of War, 2006: 112). In his opinion, a Christian warrior "had to be like David, Joshua, and Samson, who waged wars and glorified themselves. Their glory was the result of their courage, but true courage cannot exist without righteous deeds, otherwise foolish actions lead to dishonour" (Borisova, 2022: 7).

According to R. Kokhanchuk, it was "following the thoughts of Cicero, who argued that there are two ways of committing injustice: the first is to commit injustice oneself, the second is to allow others to commit injustice and remain unpunished, Ambrose came to the conclusion that there are wars that it would be unjust not to wage" (Kokhanchuk, 2003: 27). At the same time, the turning point was the thinker's definition of the subject of establishing the justice of war. The thinker entrusts this mission to the Church – 'the repository and measure of justice. Such a doctrine not only forced Christians to participate in wars that the Church deemed just, but also gave the Church itself the right to decide matters of war and peace' (Kokhanchuk, 2003: 27). Thus, Ambrose insists on the need to distinguish between just and unjust wars, believing that in some circumstances war can be considered the lesser of two evils. Accordingly, he justifies war that was intended to punish crimes or was defensive in nature. Therefore, for Ambrose, not all wars were immoral (Lietzmann, 1952: 70).

According to Ambrose, it is fundamentally important when waging war to determine its nature: whether it is just or not (Ambrose, 1896). At the same time, he emphasises the need for a prudent approach in determining the just nature of war and draws attention to the danger of a false attitude towards wars, since those who replace justice with injustice 'are cursed by God' (Ambrose, 1896). Therefore, Ambrose concludes, justice must be upheld even in war (Ambrose, 1896). In his concept, a just war appears as a legitimate (lawful) war of Christians (the Christian state, personified by the Roman Empire of that time) against injustice and, at the same time a kind of military sanction (punishment) addressed to another state or people for injustice (aggression, attack on allies, etc.).

To distinguish just wars from unjust ones, Ambrose proposes to reject the views of Eusebius of Caesarea (between 260 and 270-339/340), who believed that any war started by a Christian emperor would automatically be just, and that the enemies of the Empire were enemies of God (Dahm, 2021). Instead, the bishop proposes that a just cause for war should be considered the key criterion. Thus, in his opinion, war cannot be just when it is waged with aggressive intentions, 'seeking great power at the cost of freedom,' because in a war of conquest, 'the blessing of kindness to all is lost.' War as an instrument of justice should be waged only to help others, not oneself. 'For courage... in war protects one's country from barbarians, or at home protects the weak, or comrades from robbers, is full of justice' (Ambrose, 1896). War should not be waged for one's own glorification, but rather for the benefit of others. Explaining this idea, Ambrose refers to the Old Testament as his justification: "... according to the will of God and the unity of nature, we must... help each other through a sense of devotion or duty, giving money or doing something, in any case in some way... Thus, Saint Moses was not afraid to start terrible wars for his people, he was not afraid of the weapons of the most powerful kings, nor was he afraid of the savagery of barbarian peoples. He rejected the idea of his own safety in order to give people freedom" (Ambrose, 1896).

The justice of war is confirmed by its goal, which is inextricably linked to its desired outcomes. War that seeks to acquire land is rejected, but war that follows Moses' goal of giving 'freedom to his people' should be emulated. Referring to the following example from the Old Testament (apocryphal) and again to the works of Cicero, Ambrose discusses the desired outcome of war. He speaks of Eleazar, a warrior of Judas Maccabeus, who ended the war with King Antiochus and the Greeks through his actions. His greatest feat in Ambrose's eyes is that he 'left peace as the heir to his courage. These are the signs of triumph' (Ambrose, 1896). Therefore, war must be waged to achieve peace: '... wars should be started for this purpose, so that we may live in peace, without injustice; and once victory is secured, those who were not cruel or savage in war should be pardoned' (Ambrose, 1896).

Citing numerous examples from the history of wars, Ambrose concludes that war is a weapon of power, but in order to achieve peace, prudence must still be exercised in its conduct. Justice extends beyond the violence of war: 'the greatness of justice can be judged by the fact that there is no place, no person, no time with which it has nothing to do' (Ambrose, 1896). Thus, Christian principles of love for all people are linked to the doctrine of justice set forth by Cicero. Ambrose continues his reflections on justice during war, saying that it must be preserved in all relations with enemies. The thinker introduces the criterion of honesty in relations with the enemy, considering it repugnant to achieve victory by deceiving the opponent, because everything 'achieved by deception loses the advantage of openness' (Ambrose, 1896). It is characteristic that the traditional Roman rules of warfare, loyalty and respect for the rights of the enemy in Ambrose's concept also had to be observed (although such rules seem to have been relaxed in the case of barbarian heretics) (Russell, 1975: 13–15).

Finally, Ambrose believes that the Church should stay out of war, no matter how legitimate such actions may be for individual Christians (Swift, 1970: 537–538). A just war is incompatible with the purpose and functional role of the clergy: '... the idea of military matters seems foreign to the duty of our office, since our thoughts are more focused on the duty of the soul than on the duty of the body; our business is not to look at weapons, but rather at peaceful matters' (Ambrose, 1896); 'the duty of a priest is to harm no one, to be ready to help everyone...' (Ambrose, 1896). This was a radical departure from pagan Rome, where religion was the key to uniting people for war. Therefore, it is wrong to assume that Christianity ceased to be pacifist when it became the official religion (Frost, 2010).

Finally, the last point in Ambrose's justification of the concept of just war is that war should be the last resort in resolving conflicts. To confirm this idea, he refers to the Old Testament example of King David: 'David never waged war unless he was provoked to do so. Thus, prudence was combined in him with courage of spirit in battle' (Ambrose, 1896). Ambrose distinguishes between two types of conflict, noting that 'one occurs through debate, the other through force. Since the former is

the proper concern of humans, and the latter that of beasts, the latter should be resorted to only when the former cannot be used' (Ambrose, 1896).

Conclusion. If we summarise Ambrose's views on just war, at first glance it may seem that there is no consistent strategy in them. However, through his scattered remarks, the key features of this concept still emerge: a just war is morally justified and is a lesser evil than radical pacifism, which can open the way to evil; it is waged as a last resort; its purpose is to help and protect others, not to gain any benefit for oneself; it is defensive in nature; it is waged in order to achieve peace; a just war is an attribute of the actions of exclusively legitimate public authority. In developing this concept, the thinker combined the Jewish and Christian traditions of the Old Testament with the Roman tradition of Cicero, which made the Christian approach to just war more dependent on Roman thinking and Jewish heritage than on the postulates of Christianity. Ambrose undoubtedly used elements of the three intellectual traditions he had acquired (Roman, Jewish and Christian) in his own way to formulate a concept of just war that would incorporate elements of each of them. The fact that the Christian pacifist tradition was the main one that 'lost' in this intellectual competition was perhaps inevitable in a situation where it was absolutely necessary to legitimise war, which was necessary to defend and support the empire with Christianity as the only officially recognised state religion. Thus, the role of Ambrose's concept of just war was to support the empire in strengthening its defence capabilities, as well as to legitimise the imperial regime and, at the same time, to satisfy the spiritual needs of the empire's inhabitants. To this end, he placed Christianity at the service of the military-political and ideological needs of the state on a par with its military forces, their equipment and traditional Roman values (military valour, patriotism, endurance, courage, etc.).

In Ambrose's work, it is evident that elements of Jewish and Roman traditions had a decisive and greatest intellectual influence on him. However, it would be wrong to think that all this thinker did was to create a kind of 'mixture' of both traditions, without contributing anything new and original to the conceptualisation of a just war. Instead, he creatively used the ideas contained in the texts of the Old Testament as part of the Christian tradition, applying them to the situation in which the Christian church and its believers found themselves. He borrowed much more from the Roman tradition, but his use of Cicero's ideas does not appear to be plagiarism, as his ideas are reinterpreted and Christianised rather than borrowed directly. The next step in conceptualising the idea of a just war was the political and legal teachings of Ambrose of Milan's student and ideological successor, Aurelius Augustine, which demonstrated the continuity of Christian tradition in substantiating the key elements of the corresponding concept of a just war.

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DOI https://doi.org/10.30525/2592-8813-2026-2-9

THE FORMATION OF THE UKRAINIAN ETHNIC COMMUNITY: THE OLD RUSSIAN PERIOD AND KIEVAN RUS'

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Abstract. This study analyses the process of the formation of the Ukrainian ethnos through the lens of the Old Russian stage of development. The work focuses on the study of Kievan Rus' as a key centre of ethno-cultural integration and the foundation of Ukrainian nation-building. It examines the transition from the early Slavic period to a consolidated community, where the unifying factors were language, legal traditions, religion and a shared historical memory. Particular attention is paid to the methodological framework: the application of historical-legal, cultural and systemic approaches has enabled a comprehensive assessment of the role of state institutions and cultural factors in the formation of identity. The results of the study demonstrate that the Old Rus' period was a time when the fundamental foundations of the Ukrainian ethnic community were laid. The scientific and practical significance of the topic for contemporary national memory policy and for understanding the continuity of the historical development of the Ukrainian people is substantiated.

Key words: ethnogenesis, Ukrainian ethnic community, Kievan Rus', Old Rus' period, ethno-cultural integration, identity, historical memory, early Slavs.

Introduction. The formation of the Ukrainian ethnic community is a complex, protracted and multifaceted process, which has its roots in the early Middle Ages and is directly linked to the development of the East Slavic tribes and the emergence of statehood in Kievan Rus'. It is the Old Rus' period that represents a fundamental stage in the ethnogenesis of Ukrainians, as it was during this time that the core elements of ethnic identity – language, culture, customs, social structures and the earliest forms of political organisation – took shape.

The relevance of this research topic stems from the need for a thorough academic understanding of the origins of the Ukrainian ethnic community in the context of contemporary geopolitical and informational challenges. In contemporary academic and public discourse, the question of the Ukrainian people's origins is often the subject of political manipulation, which heightens the importance of objective historical analysis. Research into the Old Rus' period allows us not only to reconstruct the processes of early ethnogenesis, but also to establish the historical continuity of the Ukrainian nation's development.

The current state of academic research on this issue indicates considerable interest in the subject among both Ukrainian and foreign scholars. The academic literature contains various theories regarding the formation of the East Slavic peoples and the role of Kievan Rus' in this process. Some researchers view Kievan Rus' as the common cradle of the three East Slavic peoples, whilst others emphasise its decisive significance specifically for Ukrainian ethnogenesis. This academic debate necessitates a comprehensive and interdisciplinary approach to studying the issue.

The study pays particular attention to the role of Kievan Rus' as the first powerful state entity on the territory of modern Ukraine, which ensured the political, economic and cultural consolidation of the population. The emergence of statehood facilitated the integration of separate tribal confederations into a single social organism, the formation of a common legal system, and the development of trade, crafts and cultural ties. This, in turn, created the preconditions for the emergence of a higher-level ethnic community.

An important factor in the formation of ethnic identity was the adoption of Christianity, which had a profound influence on the spiritual life of society, the development of writing, education and culture. Christianisation facilitated the integration of Kievan Rus' into the European cultural sphere, which ensured the spread of new values, norms and models of social behaviour.

Furthermore, this period saw the formation of the legal foundations of society, notably through the emergence of legal texts such as the *Ruska Pravda*, which regulated social relations and contributed to the development of a legal culture. The existence of a common legal system was a key factor in the consolidation of the population and the development of a sense of belonging to a single social space.

Cultural processes played no less an important role, particularly the development of chronicle-writing, oral folk art, crafts and the arts. These ensured the transmission of historical experience, shaped collective memory and fostered an awareness of shared origins and cultural unity.

Thus, research into the formation of the Ukrainian ethnic community during the Old Rus' period allows us not only to gain a deeper understanding of the historical origins of the Ukrainian people, but also to identify the main patterns of the development of national identity, which is of great significance for contemporary academic and public discourse.

Main text. The aim of this study is to conduct a comprehensive analysis of the process of the formation of the Ukrainian ethnic community during the Old Rus' period, identifying the role of Kievan Rus' as a key stage in the ethnogenesis of the Ukrainians. Achieving this aim involves a systematic study of the historical, cultural, socio-economic and legal factors that influenced the formation of the ethnic identity of the population in the territory of modern Ukraine.

Another important aspect is identifying the patterns and characteristics of the ethnic community's development in the context of early statehood, which allows not only for the reconstruction of historical processes but also for an assessment of their significance for the subsequent formation of the Ukrainian nation.

To achieve this objective, the following main research tasks have been identified:

1. To analyse the early Slavic stage of ethnic community formation and identify its main characteristics.
2. To examine the process of the formation of Kievan Rus' as a political and cultural centre for the consolidation of the population.
3. To identify the role of economic factors, in particular the development of the economy and trade, in the formation of ethnic unity.
4. To analyse the influence of political organisation and state institutions on the process of ethnogenesis.
5. To investigate the significance of legal norms and legal culture in the formation of social stability and the integration of the population.
6. To assess the role of cultural factors, in particular language, religion, education and art, in the formation of ethnic identity.
7. To determine the influence of historical memory and traditions on the preservation of ethnocultural continuity.

The stated aim and objectives enable a comprehensive approach to the study of the formation of the Ukrainian ethnic community during the Old Rus' period, which contributes to a deeper understanding of the origins of Ukrainian national identity and its historical development.

The methodological framework of the study is based on the use of a range of general scientific and specialised methods, which enable a comprehensive analysis of the process of the formation of the Ukrainian ethnic community during the Old Russian period. The application of an interdisciplinary approach allows for the integration of historical, legal, cultural and sociological analysis.

The historical-legal method is used to analyse the processes of state formation, the development of legal institutions and their influence on the formation of the ethnic community. Particular attention

is paid to the study of customary law norms and written sources, in particular the 'Ruska Pravda', as an important element of social organisation.

The comparative method allows for a comparison of the processes of the formation of the Ukrainian ethnic community with similar processes among other European peoples. This makes it possible to identify both common features and specific characteristics of development that define the uniqueness of Ukrainian ethnogenesis.

The cultural studies approach focuses on examining the role of culture, traditions, religion and art in the formation of ethnic identity. An analysis of cultural processes helps to identify the mechanisms for the transmission of values and the formation of collective consciousness.

The sociological method is used to analyse the social structure of society, the interactions between different social groups, and the processes of social integration. This makes it possible to assess the influence of social factors on the formation of an ethnic community.

A systematic approach ensures a comprehensive study of the process of ethnogenesis as a holistic phenomenon involving the interaction of various factors. It allows the formation of an ethnic community to be viewed as a dynamic system that develops under the influence of internal and external factors.

The use of these methods ensures the scientific validity of the research and provides a comprehensive understanding of the process of the formation of the Ukrainian ethnic community during the Old Rus' period.

The Early Slavic stage marks the starting point for the formation of the Ukrainian ethnic community and spans the period from approximately the 6th to the 9th centuries. It was during this time that a gradual consolidation of the East Slavic tribes took place on the territory of modern-day Ukraine, alongside the formation of their cultural, linguistic and social unity, which laid the foundations for the further development of ethnic identity.

The early Slavic population was composed of numerous tribal confederations, among which the Polans, Drevlyans, Severians, Ulichs, Tiverians, White Croats and others were of particular significance. Each of these tribes had its own local characteristics, yet they were united by common features in their material culture, economic organisation and spiritual life. Interaction between these tribes contributed to the gradual formation of a unified ethno-cultural space (Motsia, 2007).

Economic activity was a key factor in ethnic consolidation. The economy was based on agriculture, cattle breeding, hunting and fishing. The development of crafts, particularly pottery, blacksmithing and weaving, contributed to the economic strengthening of tribal communities and the development of inter-tribal trade. This, in turn, intensified contacts between different population groups and facilitated their integration.

Natural and geographical conditions played a significant role in the formation of ethnic unity. The territory of Ukraine, rich in fertile land, river routes and forest resources, facilitated the development of the economy and the formation of stable settlements. Rivers, particularly the Dnieper, served as important transport arteries, providing links between different regions and promoting economic and cultural integration (Baran & Baran, 2005).

The linguistic factor is one of the key elements in the process of ethnogenesis. During the Early Slavic period, a Proto-Slavic linguistic community took shape, which gradually diversified whilst retaining a significant degree of internal unity. This linguistic commonality ensured effective communication between tribes and fostered a sense of belonging to a wider community.

Spiritual culture played an equally important role. The religious beliefs of the early Slavs were linked to paganism, which was based on the worship of nature, gods and spirits, as well as on a developed system of rituals and traditions. Shared beliefs contributed to the formation of cultural unity and the strengthening of social ties between tribes (Yurii, 2023).

The social organisation of early Slavic society was based on clan and tribal relations. The main units were clans and communities, which ensured collective economic activity and protection against

external threats. Gradually, social differentiation took place, manifesting itself in the emergence of a military and tribal elite, which became a prerequisite for the formation of early forms of statehood (Baran, 1998).

The growth of external contacts was also an important factor in this development. The East Slavic tribes actively interacted with the Varangians, Khazars, Byzantines and other peoples. These contacts contributed not only to economic development but also to cultural exchange, the adoption of new technologies, military practices and elements of social organisation (Tolochko & Tolochko, 1998).

Trade routes, in particular the famous route 'from the Varangians to the Greeks', played a key role in the formation of interregional links. They facilitated the exchange of goods, ideas and cultural influences, which contributed to the integration of various tribal confederations into a single economic space (Khvedchenia, 2011).

Gradually, more complex political entities with the hallmarks of early statehood began to form on the basis of tribal alliances. This manifested itself in the consolidation of princely power, the emergence of administrative centres and the formation of military structures. Such processes created the preconditions for the emergence of Kievan Rus' as the first state entity in these lands.

It is important to emphasise that the early Slavic period was not homogeneous and was characterised by both processes of integration and local differentiation. However, it was precisely the combination of these processes that ensured the formation of a stable ethno-cultural basis, which became the foundation for the further development of the Ukrainian ethnic community.

The early Slavic period played a decisive role in shaping the basic elements of the Ukrainian ethnic community. It was during this period that the foundations of language, culture, economy and social organisation were laid, which ensured the further development of the Ukrainian people and became the basis for the emergence of statehood in the form of Kievan Rus'.

The emergence of Kievan Rus' in the 9th–13th centuries marked a qualitatively new stage in the formation of the Ukrainian ethnic community, as it was during this period that the transition took place from scattered tribal confederations to a more integrated political, social and cultural entity. Kyivan Rus' emerged not only as the first state form of organisation of the East Slavic lands, but also as a powerful centre of ethno-cultural consolidation of the population.

The formation of statehood facilitated the unification of various tribal confederations around a political centre – Kyiv. This ensured the formation of a single administrative space, within which common governance norms, tax mechanisms and military organisation operated. The consolidation of power in the hands of the prince and his entourage contributed to the stabilisation of social relations and the strengthening of internal ties between regions (Tolochko & Tolochko, 1998).

The formation of a common economic system became a key factor in ethnic integration. Kievan Rus' actively developed both domestic and foreign trade, which fostered economic growth and interdependence among different territories. Trade links with Byzantium, the Scandinavian countries, Central Europe and the East ensured not only the exchange of goods but also cultural influence, which contributed to the unification of material and spiritual culture (Smolii, 2011).

Political authority played a key role in the consolidation process, gradually taking on the characteristics of a centralised system. The institution of princely power, supported by the druzhina organisation, ensured the effective administration of territories and protection against external threats. This created the conditions for the stable development and integration of the population.

The adoption of Christianity at the end of the 10th century became one of the key factors in the formation of a unified ethno-cultural community. Christianisation contributed to the spiritual consolidation of the population and the formation of a shared system of values and moral norms. It also stimulated the development of writing, education, literature and the arts, which significantly raised the level of cultural development in society (Smolii, 2013).

The introduction of Christianity facilitated the integration of Kievan Rus' into the European cultural and political sphere. This enabled the establishment of diplomatic and dynastic ties with the leading states of Europe, which enhanced the state's international status and fostered cultural exchange.

The legal system was no less an important element of consolidation. 'Ruska Pravda', as one of the oldest legal codes, regulated social relations, defined the rights and obligations of various social groups, and contributed to the establishment of the rule of law. The existence of common legal norms fostered a sense of belonging to a single social space and strengthened the internal unity of society (Blashchuk, 2005).

The social structure of Kievan Rus' gradually became more complex. Various social strata began to take shape: the princely elite, the boyars, the clergy, the artisans and the peasantry. This differentiation contributed to the development of social relations and the formation of a more complex social organisation, which is a characteristic feature of statehood.

The cultural development of Kievan Rus' played a significant role in the formation of an ethnic community. Chronicle writing, in particular the 'Tale of Bygone Years', became an important tool for shaping historical memory. Oral folk art, crafts, architecture and art reflected the shared values and cultural orientations of the population (Tolochko & Tolochko, 1998).

Language also played an important role in the consolidation process. The Old Russian literary tradition contributed to the spread of shared cultural standards, facilitating communication between different regions and strengthening cultural unity.

Foreign policy factors had a significant impact on the development of Kievan Rus'. Constant interaction with other states, both peaceful and military, contributed to the strengthening of internal organisation and the formation of political consciousness among the population.

At the same time, it should be noted that Kievan Rus' was not a homogeneous state in the modern sense. It consisted of a complex system of lands and principalities that enjoyed a degree of autonomy. However, it was precisely this structure that allowed a balance to be maintained between centralisation and local self-government (Smolii, 2009).

The period of fragmentation that ensued in the 12th–13th centuries did not lead to the complete collapse of ethno-cultural unity. Despite political decentralisation, common cultural, linguistic and religious elements persisted, continuing to unite the population.

Kyiv Rus' became a key stage in the formation of the Ukrainian ethnic community, as it ensured the political, economic and cultural consolidation of the population. It was during this period that the main elements of ethnic identity were formed, which were preserved and developed in subsequent historical eras.

The Old Rus' period is of decisive importance in the formation of the Ukrainian ethnic community, as it was during this time that the key elements of ethno-cultural identity were consolidated and the historical foundation was laid, ensuring the continuity of the Ukrainian people's development. This stage acts as a bridge between the early Slavic period and subsequent stages of nation-building, ensuring the continuity of cultural, social and spiritual traditions.

One of the most significant achievements of the Old Russian period was the development of historical memory. It was during this time that chronicle-writing emerged, recording events linked to the development of statehood, social life and culture. Chronicles, in particular 'The Tale of Bygone Years', served not only as historical sources but also as a tool for shaping collective consciousness, reinforcing the notion of a shared origin and the historical unity of the population.

Spiritual culture played an important role in the formation of the ethnic community. The adoption of Christianity contributed to the creation of a unified spiritual space that united the population regardless of their territorial origin. The Christian religion not only shaped moral norms and values but also acted as an important factor in social integration, ensuring the spiritual unity of society.

The cultural development of Kievan Rus' was also evident in the development of education, literacy and the arts. The establishment of the first schools, the development of a culture of reading and translated literature contributed to the dissemination of knowledge and the formation of an intellectual milieu. This, in turn, fostered an awareness of cultural commonality and the formation of ethnic identity.

The architecture and art of Kievan Rus' also played an important role in shaping cultural unity. Churches, icons, mosaics and frescoes reflected not only religious but also the socio-cultural values of society. They served as symbols of unity and the continuity of cultural tradition (Aseiev, 1969).

Oral folk art took on particular significance, as it preserved and passed down historical events, traditions and worldviews from generation to generation. Folk songs, legends, fairy tales and rituals shaped the collective memory and helped to strengthen ethnic identity (Kotliar, 2011).

Language, as one of the key elements of ethnic identity, played an important role in the consolidation process. The Old Russian linguistic tradition facilitated communication between different regions and contributed to the formation of a shared cultural space. Despite the subsequent differentiation of languages, it was this period that laid the foundations for the development of the Ukrainian language (Pivtorak, 1993).

Another important aspect is the formation of social and legal norms that regulated public life. The norms of customary law, as well as written sources, contributed to the establishment of order and stability in society. This created conditions for the development of social institutions and the strengthening of internal ties (Kotliar, 2011).

Despite the decline of Kievan Rus' and subsequent political fragmentation, the ethno-cultural unity of the population was not lost. Shared traditions, religion, language and historical memory continued to unite the population, ensuring the continuity of the ethnic community's development.

The Old Russian period also played an important role in the formation of territorial identity. The sense of belonging to a specific region, linked to historical events and cultural centres, helped to strengthen ethnic identity.

The significance of this stage also lies in the fact that it shaped the basic models of social organisation, which were preserved in subsequent historical periods. Traditions of self-government, interaction between the authorities and society, as well as cultural practices, became the foundation for the development of subsequent forms of statehood.

The Old Rus' period is of fundamental importance for the formation of the Ukrainian ethnic community. It ensured the establishment of the main elements of identity, shaped historical memory and cultural heritage, which became the basis for the further development of the Ukrainian people. It is precisely thanks to this period that the continuity of historical development and the preservation of national identity are ensured.

The present study has enabled a comprehensive analysis of the process of the formation of the Ukrainian ethnic community during the Old Rus' period as a complex, multi-level phenomenon that emerged as a result of the prolonged interaction of historical, socio-economic, cultural, legal and geopolitical factors. It has been established that this process was not linear, but was characterised by a combination of integrative and differentiating tendencies, which together ensured the formation of a stable ethnic identity.

First and foremost, it should be noted that the ethnogenesis of the Ukrainians during the Old Rus' period took place through the consolidation of East Slavic tribes, which gradually transitioned from local forms of organisation to more complex social structures. This process was accompanied by the formation of common elements of material culture, economic practices and spiritual life, which created the preconditions for the emergence of an ethnic community.

One of the key factors in the formation of the ethnic community was economic integration. The development of agriculture, crafts and trade facilitated the establishment of stable economic ties between different regions. Of particular importance was the development of trade routes connecting

the territories of Kievan Rus' with other parts of Europe and Asia. This ensured not only economic growth but also cultural exchange, which contributed to the unification of the population's way of life.

The political factor also played a decisive role. The formation of Kievan Rus' as a state union created the conditions for the centralisation of power and the formation of a unified system of governance. Political organisation helped to strengthen internal ties between territories and foster a sense of belonging to a shared political space.

An important aspect is the legal codification of social relations. The introduction of written law, in particular the *Ruska Pravda*, marked a significant step in the development of the legal system. Legal norms regulated social relations, defined the status of various social groups, and ensured stability within society. This contributed to the formation of a legal culture and an awareness of shared rules of coexistence.

The cultural factor played no less an important role in the nation-building process. The development of writing, literature, art and education contributed to the formation of a shared cultural space. Chronicle-writing, ecclesiastical literature and folk art shaped historical memory and ensured the transmission of cultural values between generations.

Of particular significance was the adoption of Christianity, which became a powerful integrating factor. Christianity not only united the population on a spiritual level but also contributed to the formation of a new system of values, norms of behaviour and worldview. It also ensured the integration of Kievan Rus' into the European cultural sphere.

The social structure of society underwent significant changes during this period. A social hierarchy was taking shape, comprising the princely authority, the boyars, the clergy and the dependent population. This differentiation contributed to the development of social relations and the formation of a complex system of interaction between different strata of society.

Language played a significant role in the formation of the ethnic community. The Old Russian linguistic tradition facilitated communication between different regions and promoted cultural integration. Language served not only as a means of communication, but also as a vehicle for cultural values and traditions.

Historical memory was also an important factor, shaped through chronicles, oral tradition and religious texts. It ensured continuity between generations and fostered a sense of shared origins and historical destiny.

Geopolitical factors had a significant influence on the process of forming an ethnic community. The location of Kievan Rus' at the crossroads of trade routes facilitated active interaction with other peoples. This created conditions for cultural exchange, but at the same time required the strengthening of internal unity to counter external threats.

Despite the political fragmentation that set in during the late period of Kievan Rus', the core elements of the ethnic community remained stable. A shared culture, religion, language and historical memory ensured the preservation of ethno-cultural unity, which became a key factor in the further development of the Ukrainian people.

The findings of the study indicate that the formation of the Ukrainian ethnic community during the Old Russian period was the result of the complex interplay of various factors. It was precisely this combination of factors that led to the emergence of a stable ethno-cultural system, which became the foundation for the further development of the Ukrainian nation.

Conclusions. Research into the formation of the Ukrainian ethnic community during the Old Russian period has established that ethnogenesis was a complex, protracted and multifaceted process, involving the interplay of political, socio-economic, cultural, legal and geopolitical factors.

Firstly, it has been demonstrated that the early Slavic period created the basic preconditions for ethnic consolidation, ensuring the formation of common features of material culture, economic organisation and primary social structures, which became the foundation for the further development of Kievan Rus'.

Secondly, it has been established that Kievan Rus' played a key role as a state and civilisational centre, ensuring the political integration of the East Slavic lands, facilitating the formation of a unified administrative space and the development of early state institutions.

Thirdly, it has been determined that cultural and spiritual factors were of decisive importance in the process of ethnic consolidation, in particular the adoption of Christianity, the development of writing, chronicle-keeping, education and the arts, which shaped a shared cultural and value space for the population.

Fourthly, it has been confirmed that legal mechanisms, in particular customary law and the *Ruska Pravda*, contributed to the establishment of social stability, the regulation of social relations and the strengthening of internal integration within Old Russian society.

Fifthly, it has been demonstrated that language and historical memory were key factors in the preservation of ethnic identity, ensuring the continuity of cultural development and the formation of notions of a common origin and historical destiny.

Sixthly, it has been established that even during the period of political fragmentation, ethno-cultural unity was not lost, as shared cultural, religious and linguistic elements continued to perform an integrative function.

Thus, a synthesis of the research findings leads to the conclusion that the Old Rus' period was a fundamental stage in the formation of the Ukrainian ethnic community, laying the foundations for the further development of the Ukrainian nation and its historical identity.

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DOI https://doi.org/10.30525/2592-8813-2026-2-10

MANAGEMENT IN THE CONTEXT OF UKRAINE'S ECONOMIC RESILIENCE

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Abstract. The article examines resilience management of Ukraine's economy under contemporary crisis conditions and global uncertainty. The theoretical foundations of economic resilience are substantiated, and its key components are identified, including shock resistance, adaptability, and structural transformation capacity. The impact of crisis factors such as military conflict, macroeconomic instability, and global economic disruptions on the national economy is analyzed. It is established that effective management is a decisive factor in ensuring economic resilience, encompassing macroeconomic regulation, institutional mechanisms, strategic governance, and digital transformation. International experience in building resilient economic systems is studied, and opportunities for its adaptation in Ukraine are identified. Directions for improving management approaches to enhancing the country's economic stability are proposed.

Key words: economic resilience, management, crisis management, economic stability, Ukraine, institutional development, strategic governance.

Introduction. The relevance of research into the management of Ukraine's economic resilience stems from the unprecedented challenges faced by the national economic system amid a full-scale war, global economic instability and structural transformations. Economic resilience is viewed as the ability of the economic system to withstand shocks, adapt to changes and restore sustainable growth following crises.

For Ukraine, the issue of developing effective management mechanisms to enhance economic resilience is of strategic importance, as this determines not only the pace of recovery but also the country's long-term competitiveness in the global economy. In the academic literature, considerable attention has been paid to the concept of economic resilience; however, the managerial aspect of ensuring it in the context of a protracted crisis has not been sufficiently explored.

The aim of this article is to examine the role of management in shaping and strengthening the resilience of Ukraine's economy, as well as to identify the key instruments of managerial influence on economic recovery processes.

The methodological framework of the study comprises a systematic and comparative analysis, a synthesis of statistical data from international organisations (the World Bank, the IMF), as well as the academic approaches of Ukrainian and international researchers to issues of economic resilience.

The concept of economic resilience is interpreted in contemporary academic thought as the ability of an economic system to withstand external and internal shocks, minimise their negative impact, and ensure the rapid restoration of basic development functions. According to the World Bank's approach, resilience comprises three key components: resistance, adaptability and recovery (World Bank, 2013).

Within the framework of neoclassical and institutional economic theory, resilience is viewed as the result of effective interaction between market mechanisms and public governance. In particular, the OECD emphasises that the level of economic resilience is determined by the quality of institutions, the flexibility of macroeconomic policy, and the government's ability to respond swiftly to crisis situations (OECD, 2023).

For Ukraine, this concept is particularly relevant in the context of structural economic reform, the destruction of productive infrastructure, and the need for integration into the European economic

area. In this context, resilience functions not only as an economic characteristic but also as a strategic management category that determines the effectiveness of state economic policy.

An important aspect of theoretical analysis is the distinction between the concepts of 'stability' and 'resilience'. Whilst stability implies the preservation of a system's equilibrium, resilience is the system's ability to change and adapt without losing key developmental functions (Briguglio et al., 2009). It is precisely this dynamic property that is critically important for Ukraine's modern economy.

The theoretical foundations of the study indicate that economic resilience is shaped by the complex interplay of institutional, managerial and macroeconomic factors, amongst which effective management at both the state and enterprise levels plays a key role.

The further development of the concept of economic resilience is linked to a shift from a purely macroeconomic understanding of resilience to a more comprehensive approach that takes into account managerial, institutional and behavioural factors. In contemporary research, the emphasis is shifting towards the ability of economic systems not only to withstand crises but also to transform under their influence, using shocks as opportunities for structural reform and modernisation.

In this context, resilience management is viewed as a system of managerial decisions aimed at enhancing the economy's adaptability, reducing the vulnerability of key sectors and ensuring sustainable development in conditions of uncertainty. Strategic public governance takes on particular importance, encompassing recovery planning, resource coordination, crisis management and the formulation of long-term economic policy priorities.

For Ukraine's economy, the challenge of managing resilience is multifaceted. On the one hand, it is linked to the need for the rapid restoration of damaged infrastructure, industrial capacity and the financial system. On the other hand, it stems from the need for a profound transformation of the economic model towards greater innovation, diversification of production and integration into global markets.

It is also important to bear in mind that contemporary crises are cumulative in nature and often overlap: military conflicts, energy shocks, inflationary pressures and global supply chain disruptions. This reinforces the need for proactive management, which involves not only responding to crises but also forecasting and preventing them.

Effective management of Ukraine's economic resilience must be based on a combination of state strategic governance, institutional capacity and the adaptability of the business environment. It is precisely this integrated model that enables the development of long-term economic stability in the complex conditions of the modern global environment.

An important aspect of the study is to determine the role of management tools in ensuring economic resilience at various levels–national, regional and corporate. In the current climate, the effectiveness of management directly influences the speed of economic recovery, the ability to attract investment and the creation of a competitive environment.

Scientific approaches pay particular attention to the concept of crisis management, which is an integral part of the resilient management system. Its task is to identify risks in a timely manner, minimise losses and ensure the continuity of key economic processes. In the case of Ukraine, this function is of critical importance due to the high instability of the external environment and a significant level of uncertainty.

The role of digital transformation as one of the key factors in enhancing economic resilience deserves special mention. The introduction of digital technologies into public administration, the financial sector and business processes enables greater transparency, faster decision-making and more efficient resource allocation. This, in turn, creates additional mechanisms for the economy to adapt to crisis conditions.

The management of Ukraine's economic resilience is a complex, multi-level system that combines strategic public administration, institutional reforms, crisis response mechanisms and digital innova-

tions. This study aims to provide a detailed analysis of these components and assess their effectiveness in the current context.

Main text. The aim of this research article is to provide a theoretical justification and empirical analysis of the role of management in ensuring the resilience of Ukraine's economy, as well as to identify key management tools that contribute to enhancing the resilience of the national economic system in the face of crisis challenges and global uncertainty.

To achieve this aim, the following main objectives have been identified:

1. To summarise theoretical approaches to the concept of economic resilience and its components.
2. To explore the nature of resilience management as a distinct area of modern economic governance.
3. To analyse the impact of crisis factors (military, economic, global) on the stability of Ukraine's economy.
4. To determine the role of state and corporate management in shaping the adaptability of the economic system.
5. To examine anti-crisis and strategic management tools aimed at enhancing economic stability.
6. To summarise international experience in ensuring economic resilience and the possibilities for its adaptation in Ukraine.
7. To formulate practical recommendations for improving management mechanisms to enhance the resilience of the national economy.

The research framework is based on the comprehensive use of a wide range of scientific, analytical and statistical sources, enabling a comprehensive assessment of the state and development trends of Ukraine's economy in conditions of systemic instability and crisis-driven transformations. Particular attention is paid to macroeconomic indicators reflecting the dynamics of gross domestic product, inflation, unemployment, investment activity and the balance of trade. These data enable an assessment of the country's overall economic resilience and its capacity to recover from shocks (World Bank, 2013).

Analytical reports from international organisations, in particular the World Bank, the International Monetary Fund and the United Nations Development Programme, have become an important component of the information base. These documents contain summarised assessments of the impact of global crisis factors, such as wars, energy shocks, disruptions to supply chains and financial imbalances, on the economies of developing countries. In particular, these sources enable us to determine Ukraine's position within global processes of economic turbulence and to identify key areas for enhancing its resilience (IMF, 2022).

In addition, analytical materials from the Organisation for Economic Co-operation and Development (OECD) have been utilised, which contain conceptual approaches to shaping economic resilience policies in conditions of uncertainty. These sources emphasise the role of public governance, institutional quality and the flexibility of economic systems as key factors in ensuring resilience (OECD, 2023).

The academic works of foreign researchers, in particular R. Martin and P. Sunley, who view economic resilience as a multidimensional phenomenon encompassing the ability of regional and national economies to adapt to structural changes, crises and long-term shocks (Martin & Sunley, 2015). Their approaches have deepened our understanding of the spatial and institutional aspects of economic resilience.

Materials from the United Nations Development Programme (UNDP) were also drawn upon, in which economic resilience is viewed as an integrated process of interaction between social, economic and governance factors that determine a society's capacity to recover from crisis events (UNDP, 2022). This has enabled the analysis to extend beyond purely economic indicators and take into account the socio-institutional dimension of the issue.

The methodological framework of the study is based on a combination of general scientific and specific economic methods, ensuring a comprehensive and multi-level approach to the analysis of the management of Ukraine's economic resilience.

System analysis was applied to examine economic resilience as a complex dynamic system, encompassing the interaction of public administration, market mechanisms, the institutional environment and the behaviour of economic agents. This approach has made it possible to identify the interrelationships between individual elements of the economic system and to assess their impact on the overall level of resilience (IMF, 2022).

A comparative method was used to analyse international experience in shaping economic resilience policy. A comparison of the approaches adopted by various countries and international organisations made it possible to identify the most effective models of crisis management and the scope for adapting them to the Ukrainian context (OECD, 2023).

The statistical method enabled a quantitative assessment of Ukraine's macroeconomic indicators, the identification of trends in their changes during crisis periods, and the determination of the extent to which external shocks influence economic dynamics. Particular attention was paid to the analysis of changes in GDP, inflation and the level of investment activity (World Bank, 2013).

The generalisation method was applied to synthesise the results obtained and formulate conceptual conclusions regarding the role of management in ensuring economic stability. This allowed for the integration of theoretical propositions and empirical data into a single analytical model (Martin & Sunley, 2015).

In addition, elements of institutional analysis were employed, enabling an assessment of the impact of state institutions, the regulatory environment and governance practices on the development of the economic system's resilience. This is particularly important in the context of Ukraine, where institutional transformations play a key role in economic recovery processes (UNDP, 2022).

The study found that management is one of the key factors in ensuring economic resilience, as it is through management decisions that mechanisms for the adaptation, stabilisation and recovery of the economic system are implemented. The analysis showed that the effectiveness of management determines not only the economy's ability to respond to crises, but also creates the conditions for its long-term development.

At the state level, resilience management manifests itself through the implementation of macroeconomic policy aimed at supporting financial stability, stimulating economic activity and ensuring social protection for the population. It has been established that, in the face of crisis challenges, the flexibility of fiscal policy, the effectiveness of monetary regulation and the coordination of actions between different branches of government take on particular importance. It is precisely these factors that make it possible to minimise the negative consequences of economic shocks and ensure the stable functioning of key sectors of the economy (IMF, 2022).

A key finding is the identification of the role of strategic management in building resilience. The study showed that countries with clearly defined economic development and crisis response strategies demonstrate a higher level of resilience to external shocks. In this context, it is crucial for Ukraine to implement long-term recovery strategies that combine economic, institutional and innovation components (OECD, 2023).

At the enterprise level, resilience management manifests itself through a business's ability to adapt quickly to changes in the market environment, diversify supply and sales channels, and implement innovative technologies. It has been established that enterprises that actively use digital management tools have significantly higher resilience to crises, as they are able to respond promptly to changes in supply and demand (World Bank, 2013).

Particular attention is paid to the role of institutional management, which ensures the creation of a favourable environment for the functioning of the economy. The research findings indicate that

the quality of state institutions, the level of transparency and the effectiveness of regulatory policy directly influence the economy's ability to recover from crisis shocks (UNDP, 2022).

It has also been established that crisis management is a key component of resilience management, involving the development and implementation of measures aimed at preventing crisis situations, minimising their consequences and ensuring the continuity of economic processes. In the case of Ukraine, this includes supporting critical infrastructure, stabilising the financial system and securing international assistance (IMF, 2022).

Management is a defining element in the system for ensuring Ukraine's economic resilience. An effective combination of state, institutional and corporate governance creates the conditions for enhancing the economy's resilience, its adaptation to contemporary challenges and ensuring sustainable development in the long term.

The study found that Ukraine's modern economy operates under the influence of multi-level crises, which are of both internal and external nature. The most significant of these are military conflict, macroeconomic instability, energy shocks and disruptions to global supply chains. The combined effect of these factors creates a high level of uncertainty and significantly complicates the processes of economic recovery.

The results of the analysis indicate that the military factor is a key determinant in the decline of Ukraine's economic resilience. The destruction of production infrastructure, the reduction in industrial capacity, the forced displacement of the workforce and the decline in investment activity have led to a significant slowdown in economic growth. At the same time, it has been established that even under such conditions, the economy shows signs of adaptability, manifested in the recovery of certain sectors and the reorientation of business towards new markets (World Bank, 2013).

The second important factor is macroeconomic instability, which manifests itself in high inflation, exchange rate fluctuations and a decline in the population's purchasing power. The study showed that these phenomena significantly affect the overall level of economic resilience, as they reduce opportunities for accumulating resources and investing in economic recovery (IMF, 2022).

Particular attention was paid to energy shocks, which have become one of the key challenges for Ukraine's economy. Disruptions to energy supplies, rising energy costs and the destruction of energy infrastructure have led to a decline in production activity and increased costs for businesses. At the same time, it has been established that the active introduction of alternative energy sources and energy efficiency measures helps to increase the economy's adaptability to such challenges (OECD, 2023).

Global factors also have a significant impact on economic resilience, in particular disruptions to international supply chains and changes in the global economy. The study showed that Ukraine's dependence on external markets makes its economy sensitive to global fluctuations, yet at the same time creates opportunities for diversifying trade links and integrating into new economic spaces (UNDP, 2022).

A key finding is that the negative impact of crisis factors can be significantly reduced through effective management. In particular, the timely implementation of anti-crisis measures, support for key sectors of the economy and coordination of actions between state institutions make it possible to reduce the level of economic losses and accelerate the recovery process (IMF, 2022; World Bank, 2013).

Crisis factors have a complex and interrelated impact on Ukraine's economy. At the same time, it has been established that, provided there is effective management and the implementation of adaptive strategies, their negative impact can be minimised, thereby creating the conditions for the formation of a more resilient and flexible economic system.

The study found that ensuring Ukraine's economic resilience depends to a large extent on the effective application of modern management tools, covering both the state and corporate levels. A systematic review of academic approaches has enabled the identification of key groups of management tools that enhance the resilience of the economic system in the face of crisis challenges.

The first group comprises macroeconomic regulation tools, which include fiscal and monetary policy. The study showed that flexible budget planning, effective management of public finances and control of inflationary processes are fundamental conditions for maintaining economic stability. In particular, the implementation of expansionary fiscal policy during a crisis helps to stimulate economic activity and support domestic demand (IMF, 2022).

The second important group consists of institutional instruments, which include improving the regulatory and legal environment, increasing the transparency of public administration, and strengthening institutional capacity. It has been established that effective institutions create the conditions for a rapid response to crisis situations and ensure the stability of economic processes in the long term (UNDP, 2022).

The third group comprises strategic management tools, which involve the development of long-term economic development and recovery programmes. Research findings indicate that the existence of clear strategic guidelines enables the state to coordinate resources more effectively, identify priority areas for development and ensure the consistency of economic policy (OECD, 2023).

Particular attention is paid to digital management tools, which are playing an increasingly important role in ensuring economic resilience. The introduction of digital platforms, the automation of management processes and the use of big data contribute to more effective decision-making, lower transaction costs and improved interaction between economic actors (World Bank, 2013).

At the enterprise level, the key tools are business diversification, risk management, cost optimisation and innovative development. Research has shown that companies that adopt modern management approaches, including flexible organisational structures and digital technologies, demonstrate a higher level of resilience to crisis impacts.

Another important tool is international economic cooperation, which involves securing financial assistance, investment and technology. It has been established that Ukraine's integration into the global economy creates additional opportunities to enhance its resilience, in particular through access to external resources and the exchange of expertise in crisis management (IMF, 2022; OECD, 2023).

The research findings indicate that resilience management tools are multifaceted and encompass a wide range of measures – from macroeconomic regulation to digital innovation and corporate governance. Their effective combination enhances the resilience of Ukraine's economy, facilitates its adaptation to contemporary challenges and lays the foundation for sustainable development in the long term.

The study found that international experience in ensuring economic resilience demonstrates high effectiveness when strategic management, institutional stability and innovative development are combined. An analysis of practices in developed countries has identified key approaches to building resilient economic systems that can be adapted to the conditions in Ukraine.

In particular, within the European Union, long-term strategic planning plays a key role, involving the development of comprehensive programmes to respond to crisis challenges. Such programmes include mechanisms to support businesses, stimulate innovation and ensure social stability. Research has shown that it is the systematic and consistent nature of management decisions that ensures a high level of economic resilience (OECD, 2023).

In the US, the effectiveness of economic resilience is largely ensured by the flexibility of market mechanisms, a developed financial system and the active role of the state during periods of crisis. A key element is the rapid implementation of anti-crisis measures aimed at supporting corporate liquidity and stabilising the labour market (IMF, 2022).

The experience of Asian countries, particularly South Korea and Singapore, demonstrates the importance of investment in technological development and human capital. It has been established that a high level of economic digitalisation and effective public governance facilitate rapid adaptation to external shocks and ensure competitiveness at the global level (World Bank, 2013).

Particular attention has been paid to the experiences of countries undergoing post-crisis recovery. The analysis has shown that the key factors for successful recovery are international support, the effective use of financial resources, and the implementation of structural reforms. In this context, international organisations that provide financial and expert assistance for the recovery of economic systems play an important role (UNDP, 2022).

Based on the analysis, the main directions for adapting international experience to the conditions in Ukraine have been identified. Firstly, it is necessary to implement long-term economic development strategies that take into account current challenges and are geared towards enhancing the economy's resilience. Secondly, it is important to strengthen the state's institutional capacity, which will ensure effective resource management and the coordination of anti-crisis measures. Thirdly, the active implementation of digital technologies and innovations is advisable, as this will contribute to increasing the productivity of the economy.

It has also been established that integration into international economic structures is of particular importance for Ukraine, as it provides access to financial resources, cutting-edge technologies and managerial expertise. This creates additional opportunities to enhance economic resilience and accelerate recovery processes.

International experience is an important source for developing an effective system for managing the resilience of Ukraine's economy. Adapting this experience to national circumstances will enhance the resilience of the economic system and ensure its stable development in the long term.

Conclusions. The study has established that the management of Ukraine's economic resilience is a complex, multi-level system that combines macroeconomic regulation, institutional mechanisms, strategic management and corporate management tools. Its effectiveness directly determines the national economy's ability to withstand crisis shocks, adapt to changes in the external environment and ensure recovery following destructive impacts.

It has been demonstrated that economic resilience is shaped by three key components: shock resistance, the adaptability of the economic system, and the capacity for structural transformation. It has been established that the absence of balanced development in at least one of these components significantly reduces the overall level of the state's economic resilience.

An analysis of crisis factors has shown that military operations, macroeconomic instability, energy shocks and disruptions to global supply chains have the most significant negative impact on Ukraine's economy. At the same time, it was determined that, provided there is effective management, their negative impact can be partially offset through adaptive mechanisms and international support.

A summary of the research findings confirmed that government and strategic management play a key role in ensuring economic resilience, as they determine the effectiveness of anti-crisis policies, the coordination of resources, and the implementation of long-term development programmes. It was also established that the digitalisation of the economy and innovative development significantly enhance the economic system's capacity to adapt.

A comparative analysis of international experience has shown that the most effective models of economic resilience are based on a combination of strategic planning, a strong institutional framework and the active implementation of innovations. It has been established that the adoption of these approaches in Ukraine is a prerequisite for enhancing its economic resilience.

Thus, the research objective has been achieved and the tasks set have been fulfilled. The results confirm that the development of effective resilience management is a key factor in ensuring Ukraine's stable and long-term economic development in the face of contemporary global challenges.

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DOI https://doi.org/10.30525/2592-8813-2026-2-11

NOTARIAL SYSTEMS IN COUNTRIES BELONGING TO THE ROMAN-GERMANIC LEGAL FAMILY

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Abstract. The article examines notarial systems in the countries of the Romano-Germanic legal family within the context of the development of the Latin notarial model. The research is based on comparative legal, historical-legal, and systemic methods, allowing a comprehensive analysis of notarial organization in France, Germany, and Italy. It is established that notaries in continental European states perform preventive justice functions, ensure legal certainty in civil circulation, and are characterized by a high level of professional responsibility. Current trends in the digitalization of notarial activity and harmonization of European legal standards are identified. The study concludes that the Latin notarial model is effective and that foreign experience should be used to improve the notarial system of Ukraine.

Key words: notariat, Romano-Germanic legal family, Latin notariat, notary, comparative law, digitalization.

Introduction. The notarial system is one of the key elements of the legal systems of countries belonging to the Romano-Germanic legal family, as it ensures the stability of civil transactions, provides preventive protection of the rights and legitimate interests of individuals and legal entities, and promotes the principle of legal certainty. In the current context of the development of private international law, European integration, and the digitization of legal procedures, research into models of notarial organization in countries with a civil law system and their impact on the effectiveness of legal regulation of social relations is of particular importance.

The issues surrounding the functioning of the notarial system in countries of the Romano-Germanic legal family are the subject of research by both Ukrainian and foreign scholars. Significant contributions to the study of the legal nature of the notarial system, its functions, and its role in the mechanism for protecting civil rights have been made by M. Dolynska (2018), V. Komarov and V. Barankova (2020), and S. Fursa and E. Fursa (2023). In their works, the notarial system is viewed as a special legal institution of preventive justice, whose activities are aimed at ensuring the legal security of transactions and minimizing litigation.

In foreign legal doctrine, significant attention is devoted to the analysis of the Latin model of the notarial system, which is characteristic of most countries in continental Europe. In particular, R. David and John E. C. Brierley (1985), K. Zweigert and H. Kötz (1987) examined the characteristics of the Romano-Germanic legal tradition and the role of the notary as a state-authorized official who performs public-law functions in the sphere of civil transactions. The scholars emphasize that the notarial profession in the states of this legal family performs not only certifying but also advisory and preventive functions.

Specific aspects of the organization of notarial systems in France, Germany, Italy, and Spain were highlighted in works devoted to comparative law and European private law (Myrza & Serednytska, 2021). The researchers emphasize that the Latin notarial system is characterized by a high level of professional responsibility on the part of the notary, a special procedure for entering the profession, and a combination of state oversight and professional self-regulation.

At the same time, contemporary academic literature has not sufficiently explored the issue of the transformation of notarial systems under the influence of digitalization, electronic document

management, and the harmonization of European legislation. The issues of adapting foreign experience to the Ukrainian notarial system in the context of reforming the state's legal system and Ukraine's integration into the European legal space require further scholarly analysis.

In the legal doctrine of countries belonging to the Romano-Germanic legal family, the notarial system is traditionally viewed as an institution of preventive justice, whose activities are aimed at ensuring the stability of civil transactions and preventing the emergence of legal conflicts. Unlike the Anglo-Saxon legal system, where notarial functions are limited in scope, in the continental legal tradition, the notary is vested with broad public powers regarding the certification of legal transactions, the establishment of legal facts, and the assurance of the evidentiary value of documents.

One of the most common approaches in modern legal scholarship defines the notarial system as an independent legal institution that combines elements of state activity and independent professional practice. In particular, scholars emphasize that in countries with a civil law notarial system, the notary acts as a representative of the state, since they act on its behalf and certify legally significant acts, yet simultaneously carry out their professional activities on the principles of self-governance and independence (Lyla-Barska, 2023).

A functional approach to understanding the legal nature of the notarial profession is also common in the academic literature. Its essence lies in defining notarial activity through the set of functions performed by a notary within the legal regulatory framework. Researchers classify the main functions of the notarial system as law enforcement, preventive, certification, advisory, and evidentiary functions. Particular importance is attached to the preventive function, as the notary, by verifying the legality of transactions and explaining their legal consequences to the parties, helps prevent the emergence of legal disputes (Gusarov et al., 2024).

Significant attention in scholarly works is also devoted to the relationship between the notarial profession and the judiciary. Some researchers view the notarial profession as a supporting element of the justice system that ensures the implementation of the principle of legal certainty in civil legal relations. Other scholars emphasize the autonomous nature of notarial activity and stress that the notarial profession is a separate institution within the legal system that performs special functions in the sphere of protecting the rights and legitimate interests of citizens (Herych & Herych, 2025).

In the current context of the development of legal systems in states of the Romano-Germanic legal family, the concept of the notarial profession is undergoing significant changes under the influence of digitalization and European integration. This necessitates a rethinking of traditional approaches to defining the legal nature of the notarial profession and its role in ensuring the effective functioning of civil transactions. At the same time, the primary purpose of the notarial system remains unchanged – ensuring legal certainty, legality, and stability in private law relations.

Main text. The relevance of studying notarial systems in countries of the Romano-Germanic legal family stems from contemporary processes of reforming national legal systems, the development of private international law, and the need to ensure an effective mechanism for protecting the civil rights and legitimate interests of parties to legal relationships. In the context of globalization and Ukraine's integration into the European legal space, the study of foreign experience in organizing notarial activities takes on particular significance, as it can be used to improve the national notarial system.

The modern notarial system in countries of the Romano-Germanic legal family is an important element of the mechanism for the legal regulation of private law relations. Its activities are aimed at ensuring legal certainty in civil transactions, confirming indisputable rights and facts, and preventing the emergence of legal conflicts. In this regard, a study of the notarial systems of France, Germany, Italy, Spain, and other countries of continental Europe allows for the identification of the most effective mechanisms for the legal regulation of notarial activities and outlines the prospects for their implementation in Ukrainian legislation.

This issue is particularly relevant in the context of the digitization of legal procedures and the introduction of electronic notarial services. In most countries of the Romano-Germanic legal family, electronic registries, digital means of document certification, and remote forms of notarial proceedings are being actively introduced. Such changes require a comprehensive scientific analysis, as they affect the traditional foundations of the notarial system's operation and transform its legal nature.

The purpose of this article is to conduct a comprehensive comparative legal analysis of notarial systems in countries of the Romano-Germanic legal family, to identify their characteristic features, organizational and operational specifics, and to explore the prospects for utilizing foreign experience in the process of improving Ukraine's notarial system.

To achieve this objective, the article aims to address the following research questions:

– to define the concept and key characteristics of the notarial system in countries of the Romano-Germanic legal family;

– to examine the historical background of the development of the Latin model of the notarial system;

– analyze the characteristics of the organization of notarial practice in France, Germany, Italy, and other countries of continental Europe;

– describe the legal status of a notary and the procedure for entering the profession;

– to examine current trends in the digitization of notarial practice;

– to identify opportunities for adapting foreign experience to the notarial system of Ukraine.

The practical significance of the study lies in the possibility of using its results to improve Ukraine's legislation on the notarial system, reform the system of notarial practice, and harmonize national legal regulation with European standards.

The Romano-Germanic legal family is one of the most widespread legal systems in the world, formed on the basis of the reception of Roman law and the subsequent development of the continental legal tradition. The states belonging to this legal family include France, Germany, Italy, Spain, Poland, and most other countries of continental Europe. The main characteristics of the Romano-Germanic legal family are the primacy of statutory law as a source of law, the codified nature of legislation, the division of law into public and private law, and the significant role of legal doctrine in the process of lawmaking and law enforcement (Sytar & Chornobai, 2009).

An important component of the Romano-Germanic legal tradition is the notarial institution, which serves to ensure legal certainty in civil transactions and to protect the rights of parties to private law relationships. Unlike the Anglo-Saxon legal system, where notarial functions are predominantly technical in nature, in civil law countries the notary acts as a special entity endowed by the state with public powers to certify legal transactions and legal facts.

One of the key features of the notarial system in countries of the Romano-Germanic legal family is its public-law nature. The notary acts on behalf of the state, and notarial acts possess heightened evidentiary and enforceable force. This ensures a high level of trust in notarial documents and contributes to the stability of civil legal relations.

Another important feature is the preventive nature of notarial activities. In the Latin notarial system, the notary's primary task is not only to authenticate legal transactions but also to prevent potential legal conflicts by verifying the legality of agreements, ascertaining the parties' true intent, and providing them with necessary legal explanations (Mirza et al., 2024). Thanks to this, the notarial system serves as a unique mechanism for the pre-litigation protection of the rights of citizens and legal entities.

The Roman-Germanic legal family is also characterized by a high level of professional training for notaries and strict requirements for entry into the profession. In most countries of continental Europe, a person may be appointed as a notary only after obtaining a legal education, completing a specialized internship, and passing qualifying exams (Lyla-Barska, 2022). This approach ensures a high level of professional competence among notaries and the effective performance of their public-law functions.

Furthermore, the notarial profession in countries of the Romano-Germanic legal family operates on the basis of a combination of state oversight and professional self-regulation. The state defines the legal framework for notarial activities, monitors their legality, and establishes the procedure for entering the profession, while professional notarial organizations ensure compliance with ethical standards, the professional development of notaries, and the protection of their professional rights.

In countries belonging to the Romano-Germanic legal family, the notarial profession is a vital component of the legal regulatory framework, combining the characteristics of a public institution with those of an independent professional practice. Its function is to ensure the rule of law, the stability of civil transactions, and the effective protection of the rights of parties to private law relationships.

The formation of the Latin model of the notarial profession is inextricably linked to the historical development of the Romano-Germanic legal family and the reception of Roman law in the countries of continental Europe. The first elements of notarial activity emerged as early as in Ancient Rome, where the functions of drafting and certifying documents were performed by tabellions and notaries. It was they who recorded legally significant facts and formalized legal transactions, which became the basis for the further development of notarial activity in European states (Orzikh, 2017).

During the Middle Ages, the notarial profession actively developed in Italian city-states, particularly in Bologna, Venice, and Genoa, where a professional notarial guild was established. The Bologna School of Law had a significant influence on the development of the Latin notarial system; its representatives conducted research on Roman law and promoted the spread of the practice of officially certifying legal acts. During this period, the notary began to be viewed not merely as a person who drafts documents, but as a representative of public authority, endowed by the state with special powers (Orzikh, 2017).

The further development of the notarial system in the countries of continental Europe took place under the influence of the centralization of state power and the codification of legislation. France played a particularly significant role in shaping the modern Latin model of the notarial system, where, following the adoption of the Napoleonic Code, the status of the notary as a public official was enshrined in law. The French model of the notarial system became the basis for the development of notarial systems in many states of the Romano-Germanic legal family, as it combined the principles of state control, professional independence, and preventive protection of civil rights (David & Brierley, 1985).

In Germany, the formation of the notarial system took into account the peculiarities of the state's federal structure and the historical traditions of individual states. The German notarial system was characterized by a high level of professional training for notaries and a strong focus on ensuring the legality of civil transactions (Lyla-Barska, 2022). In the course of the development of the German legal system, the notary became an important actor in law enforcement, ensuring the legal validity of transactions and the protection of the rights of parties to civil relations.

In Italy and Spain, the notarial profession also developed as an institution of public law, performing the functions of certifying transactions and ensuring the legal security of civil transactions. A distinctive feature of these countries was the formation of powerful professional notarial organizations that actively participated in regulating notarial activities and maintaining professional standards (Myrza & Serednytska, 2021).

In the 19th and 20th centuries, the Latin notarial system spread internationally and became the foundation for the operation of notarial systems in most countries of continental Europe and Latin America. An important stage in the development of international cooperation in the field of notarial practice was the creation of the International Union of Latin Notaries, whose activities are aimed at the unification of notarial practice, the exchange of professional experience, and the development of legal standards for notarial activities (Myrza et al., 2024).

The historical development of the Latin model of notarial practice attests to its close connection with the processes of the formation of the continental legal tradition. It was the historical features

of the formation of the Romano-Germanic legal family that determined the modern status of the notary as an independent professional who simultaneously performs public-law functions and ensures the stability of civil transactions.

The notarial systems in France, Germany, and Italy belong to the classical Latin model of notarial practice, which took shape within the Roman-Germanic legal family and is characterized by the notary's public-law status, a high level of professional responsibility, and the preventive nature of notarial activities. At the same time, the organization of notarial systems in these countries has its own distinctive features, determined by historical, political, and legal factors.

The French notarial system is traditionally considered one of the most developed models of the Latin notarial system. In France, a notary is a public official appointed by the state and acting on its behalf. The primary function of a French notary is to authenticate legal transactions, confer authenticity upon them, and ensure the legal validity of documents (Orzikh, 2017). Notarial acts in France have heightened probative value and may be directly enforced without recourse to the courts, which significantly enhances the effectiveness of civil rights protection.

A distinctive feature of the French notarial system is the combination of state oversight and professional autonomy. The French Ministry of Justice oversees the activities of notaries, determines the requirements for entering the profession, and sets the number of notary offices in specific regions. At the same time, notarial chambers play a significant role in regulating professional activities, ensuring compliance with professional ethics and organizing continuing education for notaries.

The German notarial system is more differentiated in nature. In Germany, there are several models for organizing notarial activities depending on the federal state. The most common are the "pure notary" model, under which a notary engages exclusively in notarial activities, and the "lawyer-notary" model, under which a person simultaneously practices as both a lawyer and a notary (Lyla-Barska, 2022).

Despite organizational differences, the German notarial profession is characterized by a high level of professional training and strict requirements for candidates for the position of notary. A person must have a higher legal education, significant practical experience, and undergo a complex professional selection process. The primary purpose of a notary's work in Germany is to ensure the legality of transactions and protect the interests of all parties involved in civil legal relationships.

The Italian notarial system also belongs to the civil law tradition and is characterized by a high level of legal regulation of notarial activities. Notaries in Italy are independent professionals who perform public functions and authenticate civil law acts, inheritance matters, corporate documents, and other legally significant acts. A key feature of the Italian notarial system is the significant level of digitization of notarial activities and the active use of electronic registries (Myrza et al., 2024).

The organization of Italy's notarial system involves strict control over the number of notaries and high qualification requirements for candidates. Access to the profession is granted through a rigorous state examination, which ensures a high level of professional training for notaries. Additionally, notarial organizations in Italy play a significant role in ensuring professional discipline and monitoring compliance with ethical standards (Myrza & Serednytska, 2021).

A comparative analysis of the notarial systems of France, Germany, and Italy reveals common features characteristic of the Latin model of notarial practice. These include the public-law status of the notary, the preventive nature of notarial activities, high requirements for professional training, and the combination of state oversight with professional self-regulation. At the same time, each state has developed its own model for organizing the notarial system, reflecting the peculiarities of its historical and legal development.

The legal status of a notary in countries of the Romano-Germanic legal family is defined by a unique combination of the characteristics of a public official and an independent professional. The notary is vested by the state with special powers to authenticate legal transactions, certify legal facts, and

ensure the legal validity of documents; however, in the performance of professional activities, he acts independently and is guided exclusively by the law. This approach is aimed at ensuring the objectivity of notarial activities and protecting the rights of all participants in civil legal relations.

In most countries with a civil law notarial system, a notary holds the status of a public official. This means that documents certified by them have heightened probative value and are presumed authentic until their invalidity is established in court. This is precisely why individuals seeking to hold the office of notary are subject to heightened requirements regarding professional qualifications, moral character, and legal experience (Myrza et al., 2024).

The process for entering the notary profession in countries of the Romano-Germanic legal tradition is complex and multi-tiered. A general requirement is a law degree and significant practical experience in the legal field. For example, in France, a candidate for the position of notary must complete specialized professional training and an internship at a notary's office, after which they take a qualifying exam and obtain the right to practice as a notary (Orzikh, 2017).

In Germany, the procedure for entering the profession is even more rigorous. A candidate must successfully pass two state bar exams, complete a lengthy internship, and demonstrate a high level of professional competence. In some federal states, only individuals with significant experience in legal practice may become notaries. This approach ensures a high level of professionalism among notaries and the effective performance of their public-law functions (Lyla-Barska, 2022).

In Italy, access to the notary profession is granted through a state competitive examination, which is considered one of the most difficult legal qualification exams. Candidates must demonstrate in-depth knowledge of civil, inheritance, corporate, and private international law. The high level of competition is due to the limited number of notary positions and the significant level of responsibility placed on the notary (Myrza et al., 2024).

One of the most important components of a notary's legal status is professional liability. In countries of the Romano-Germanic legal family, notaries bear disciplinary, civil, administrative, and, in certain cases, criminal liability for the improper performance of their professional duties. Disciplinary liability applies for violations of professional ethics or the rules governing notarial practice and is enforced through notarial self-governing bodies or state oversight.

A notary's civil liability arises in cases where harm is caused to individuals or legal entities as a result of unlawful or negligent actions. In most countries of the Latin notarial tradition, professional liability insurance for notaries is mandatory, ensuring compensation for damages to individuals whose rights have been violated as a result of the notary's wrongful actions.

In countries of the Romano-Germanic legal family, particular attention is paid to the notary's adherence to professional ethics. The fundamental principles of notarial practice are independence, impartiality, confidentiality, legality, and professional competence. Compliance with ethical standards is monitored by notary chambers and other professional self-regulatory bodies, which have the authority to impose disciplinary measures on notaries in the event of a breach of professional duties.

The legal status of a notary in countries of the Romano-Germanic legal family is characterized by a high level of public trust, a complex procedure for entering the profession, and a significant degree of professional responsibility. This model ensures the effective functioning of the notarial system as an institution for the preventive protection of civil rights and a guarantor of the stability of civil transactions.

The current stage of development of the notarial system in countries of the Romano-Germanic legal family is characterized by the active introduction of digital technologies into the sphere of notarial activity. Digitalization processes encompass electronic document management, the creation of electronic registries, the use of digital signatures, remote certification of certain legal transactions, and the integration of notarial systems with state information resources. These changes are aimed at improving the efficiency of notarial activities, simplifying citizens' access to notarial services, and ensuring an adequate level of legal certainty (Myrza et al., 2024).

One of the countries most actively implementing digital technologies in the notarial sector is France (Myrza et al., 2024). French notaries use electronic document exchange systems, electronic archives, and digital means of certifying legal transactions. An important area of reform has been the creation of centralized electronic registries, which provide prompt access to information on real estate, inheritance rights, and other legally significant data.

In Germany, the digitization of notarial services is carried out in accordance with high standards of personal data protection and information security. Significant attention is paid to the electronic exchange of information between notaries, courts, and government agencies. In addition, German law provides for the use of electronic documents in corporate legal relations and certain types of registration procedures (Myrza et al., 2024).

In Italy, the digitization of notarial activities has become a key element of the modernization of the public administration system. Italian notaries actively use electronic registries and digital platforms to execute transactions related to real estate and corporate rights. The implementation of modern information technologies has significantly reduced document processing times and improved the efficiency of notarial proceedings (Myrza et al., 2024).

At the same time, the process of digitizing the notarial profession is accompanied by a number of legal and organizational challenges. One of the main ones is the need to ensure an adequate level of protection for personal data and confidential information. In countries of the Romano-Germanic legal family, the notary traditionally serves as a guarantor of legal certainty; therefore, the introduction of electronic technologies requires the creation of effective cybersecurity mechanisms and protection of information against unauthorized access.

Another important trend in the development of the notarial profession is the harmonization of legislation among European Union member states in the field of notarial activities. European integration promotes the unification of approaches to the authentication of legal transactions, the mutual recognition of notarial acts, and the simplification of cross-border civil transactions. European Union regulations in the areas of inheritance law, electronic identification, and digital services have a significant impact on the development of notarial systems (Myrza & Serednytska, 2021).

In the current context of notarial reform, the issue of combining the traditional principles of the Latin notarial system with the latest digital technologies takes on particular significance. Despite the active implementation of electronic services, the fundamental principles of a notary's practice remain legality, independence, professional competence, and ensuring legal certainty in civil legal relations.

For Ukraine, the experience of digitizing notarial activities in countries of the Romano-Germanic legal family holds significant practical importance. Studying European models of electronic notarial practice allows for identifying promising directions for modernizing the national notarial system, improving electronic registries, and enhancing the protection of the rights of participants in civil transactions.

A comparative legal analysis of notarial systems in the Roman-Germanic legal family reveals common conceptual foundations for the organization of notarial practice, which have evolved within the framework of the Latin model of notarial practice. The main common features include the public-law status of the notary, the performance of activities on behalf of the state, the preventive nature of notarial activities, high qualification requirements for entry into the profession, and the combination of state control with elements of professional self-governance.

Despite the commonality of basic principles, the notarial systems of individual states have significant differences, due to the peculiarities of national legislation, historical development, and state structure. For example, in France, the notarial system operates as a centralized system with a high level of state regulation and a clearly defined number of notarial positions. A French notary acts as a public official, and notarial acts are enforceable without the need to go to court.

In Germany, the notarial system is characterized by greater flexibility and a wider variety of organizational models. The existence of the "lawyer-notary" system in certain federal states reflects

the combination of notarial and legal practice, which is a distinctive feature of the German notarial system. At the same time, the primary priority remains ensuring the legality of transactions and protecting the interests of parties to civil legal relationships.

The Italian notarial system is distinguished by a high level of professional competition and significant attention to the digitization of notarial activities. Italian notaries actively use electronic means of executing legal transactions and integrated information systems, which ensures the efficiency and legal reliability of notarial proceedings.

A common trend for most countries in the Romano-Germanic legal family is the gradual introduction of electronic notarial services and the development of international cooperation in the field of notarial practice. Within the European Union, legislation is being harmonized regarding electronic identification, digital document management, and the mutual recognition of notarial acts. This contributes to the simplification of cross-border legal relations and the establishment of uniform standards for notarial practice.

For Ukraine, the experience of countries in the Romano-Germanic legal family is of great importance in the context of reforming the national notarial system and adapting legislation to European standards. First and foremost, the adoption of mechanisms for the digitization of notarial activities, the improvement of electronic registries, and the integration of notarial information systems with state databases are promising areas. Another important direction for reform is raising professional requirements for notaries and strengthening the role of professional self-governance.

Particular attention must be paid to ensuring a balance between state control and the independence of notarial activities. European experience shows that the effective functioning of the notarial system is possible only when a high level of professional autonomy for notaries is combined with effective mechanisms of state oversight and disciplinary accountability.

Furthermore, the development of the concept of the notarial system as an institution for the preventive protection of civil rights holds promise for Ukraine. In countries of the Romano-Germanic legal family, notaries perform not only a certification function but also provide legal support for transactions, explain the legal consequences of their actions to the parties, and help prevent litigation. The introduction of such approaches into the national legal system could help increase legal certainty and public trust in the notarial institution.

A comparative legal analysis of notarial systems in countries of the Romano-Germanic legal family leads to the conclusion that the Latin model of notarial practice is effective as a mechanism for ensuring the stability of civil transactions and protecting the rights of parties to private law relationships. The use of positive foreign experience can become an important factor in improving Ukraine's notarial system and its further integration into the European legal space.

Conclusions. The study found that the notarial systems of countries in the Romano-Germanic legal family were formed on the basis of the Latin model of notarial practice, which is characterized by the public-law status of the notary, the preventive nature of notarial activities, and a high level of professional responsibility. The notarial system in countries of the civil law tradition performs the important function of ensuring legal certainty in civil transactions, protecting the rights and legitimate interests of individuals and legal entities, and preventing the emergence of legal conflicts.

The study revealed that in France, Germany, and Italy, the notary serves as a public official who acts on behalf of the state and is vested with special powers to authenticate legal transactions and legal facts. Common features of the notarial systems in these countries include high qualification requirements for entry into the profession, a combination of state oversight with professional self-regulation, and a high level of professional responsibility for notaries.

The analysis has shown that the current development of the notarial system in countries belonging to the Romano-Germanic legal family is characterized by the active implementation of digital technologies and electronic forms of notarial proceedings. The digitization of notarial activities

contributes to improving the efficiency of notarial services, ensuring the promptness of document flow, and enhancing mechanisms for the legal protection of participants in civil legal relations. At the same time, such processes require proper legal regulation and effective mechanisms for the protection of personal data and confidential information.

A comparative legal analysis of notarial systems in countries of the Romano-Germanic legal family has identified promising directions for improving Ukraine's notarial system. In particular, it is advisable to adopt European experience in the field of digitizing notarial activities, improving electronic registries, strengthening the professional training of notaries, and developing mechanisms for professional self-governance. The development of the concept of the notarial system as an institution for the preventive protection of civil rights is also of great importance, as it will contribute to enhancing the level of legal certainty and stability of civil transactions in Ukraine.

Thus, the notarial systems of countries in the Romano-Germanic legal family demonstrate the effectiveness of the Latin model of notarial practice as a key element of the legal framework governing private law relations. The use of positive foreign experience and the adaptation of European standards to national legislation can become important factors in the further reform and modernization of Ukraine's notarial system.

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DOI https://doi.org/10.30525/2592-8813-2026-2-12

STRATEGIC MANAGEMENT OF US INNOVATION SYSTEMS IN THE CONTEXT OF GLOBAL MODELS OF INNOVATION MANAGEMENT

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Abstract. This article presents a comparative analysis of strategic management of innovation systems in the United States within the context of global innovation management models. The methodological framework of the study is based on the classification approach to innovation system management models proposed by O. Likhota, which includes criteria such as the level of government intervention, institutional structure, R&D funding mechanisms, the role of public-private partnerships, and the effectiveness of intellectual property protection. The study employs a systemic-comparative approach to analyze strategic management models in the United States, the European Union, China, and Israel. The results of the study show that the effectiveness of national innovation systems is largely determined by the quality of strategic management and the ability to balance government regulation with market mechanisms. The findings contribute to the theoretical development of innovation management and can be applied in the formulation of national innovation policy.

Key words: strategic management, innovation systems, United States, innovation governance, R&D, public-private partnership, global models.

Introduction. In today's global economy, innovation serves as a key factor in ensuring sustainable economic growth, enhancing the competitiveness of national economies, and shaping new technological paradigms. Amid intensifying global competition, digital transformation, and the transition to a knowledge-based economy, the effectiveness of innovation systems has become of strategic importance to the state.

At the same time, innovation cannot be viewed solely as a result of market mechanisms. The experience of leading countries worldwide shows that strategic management plays a key role in ensuring the effectiveness of innovation processes; it shapes institutional conditions, sets development priorities, and ensures coordination among the main actors of the innovation system – the state, business, and the science and education sector.

Research on the strategic management of innovation systems is of particular relevance in the context of global models for managing innovation activities. The scientific literature has developed a number of approaches to understanding innovation systems, among which the concept of national innovation systems occupies a leading position, emphasizing the interaction of institutions and their role in the creation and dissemination of knowledge. In parallel, the concept of open innovation is developing, which emphasizes the importance of integrating external and internal sources of knowledge in the innovation process.

At the same time, contemporary research is increasingly focusing on the role of the state as an active agent in innovation policy. In particular, the "entrepreneurial state" approach justifies the need for strategic state intervention in the formation and development of innovation markets, especially in high-risk sectors. This indicates that the effectiveness of innovation systems depends to a significant extent not only on the level of resource provision but also on the quality of strategic management.

Despite the significant number of scientific works devoted to the study of innovation systems, the problem of determining the optimal model of strategic management remains unresolved. Different countries demonstrate different approaches to managing innovation activities, which is due to the

historical, economic, and institutional characteristics of their development. In this context, a comparative analysis of global models for managing innovation systems is of particular interest, as it allows for the identification of their strengths and weaknesses.

In particular, the U.S. model is traditionally regarded as one of the most effective in the world due to its combination of market mechanisms with elements of strategic government regulation. It is characterized by a high degree of decentralization, a significant role for the private sector, and a well-developed venture capital infrastructure. At the same time, the European model is marked by a higher level of institutional coordination and a focus on sustainable development, the Chinese model by a high degree of centralization and government control, and the Israeli model by high dynamism and an entrepreneurial orientation.

Despite this, contemporary academic literature does not devote sufficient attention to a comprehensive analysis of the strategic management of innovation systems specifically through the lens of global management models. There is a need to systematize approaches to classifying such models, as well as to develop analytical tools that allow for their comparison based on standardized criteria.

In this context, it is important to use the approach to classifying innovation management models proposed by O. Likhota, which allows for the analysis of innovation systems based on parameters such as the level of government intervention, institutional structure, R&D funding mechanisms, the role of public-private partnerships, and the effectiveness of intellectual property protection (Likhota, 2025). The application of this approach creates an opportunity for a comprehensive comparative analysis of innovation systems in different countries.

Thus, the research problem lies in the need to identify the characteristics of the strategic management of the U.S. innovation system and its place among global models of innovation management. Solving this problem has both theoretical and practical significance, as it allows for the formulation of recommendations for improving national innovation policy in the context of global transformations.

Main text. The issue of strategic management of innovation systems is the subject of active scientific discourse in the foreign literature, where a number of conceptual approaches have been developed to understand the mechanisms of innovation activity at the national and global levels. Significant contributions to the development of this topic have been made by scholars such as R. Nelson, B.A. Lundvall, G. Chesbrough, M. Mazzucato, F. Malherbe, and D. Teece, whose works form the theoretical and methodological foundation of modern strategic innovation management.

One of the fundamental approaches to the study of innovation systems is the concept of national innovation systems developed by Richard Nelson. In his works, the innovation system is viewed as a set of institutions whose interaction ensures the creation, dissemination, and utilization of knowledge. The researcher pays particular attention to the role of government policy in shaping a favorable innovation environment, emphasizing that the effectiveness of innovation depends on the coordination of actions among various institutional actors (Nelson, 1993).

Bengt-Åke Lundvall further developed this concept, focusing on learning and knowledge-sharing processes as key elements of the innovation system. He emphasizes that innovation is the result of an interactive process in which network connections between enterprises, research institutions, and government agencies play a crucial role. This approach allows us to view innovation systems not merely as institutional structures, but as dynamic networks of interaction (Lundvall, 1992).

An important area of contemporary research is the concept of open innovation proposed by Henry Chesbrough. According to this approach, innovation processes extend beyond the boundaries of individual organizations and involve the active use of external knowledge sources. This significantly changes approaches to strategic management, as companies and governments are forced to integrate external resources into their own innovation strategies, forming open innovation ecosystems (Chesbrough, 2003).

Mariana Mazzucato has made a significant contribution to the development of the theory of strategic innovation management by establishing the concept of the "entrepreneurial state." In her research, she argues that the state plays not only a regulatory role but also an active investment role in the development of innovation, particularly in high-tech sectors. Her approach emphasizes the importance of strategic state intervention as a factor in the formation of new markets and technological breakthroughs (Mazzucato, 2013).

Franco Malerba further developed the systemic approach to innovation by proposing the concept of sectoral innovation systems. He argues that the characteristics of innovation activities depend to a significant extent on the specifics of individual sectors, which requires a differentiated approach to strategic management. Such an approach allows for sector-specific characteristics to be taken into account when formulating innovation policy (Malerba, 2002).

Christopher Freeman made a significant contribution to the development of the theoretical foundations of innovation, being one of the first to systematize approaches to the analysis of innovation systems at the national level. His research emphasizes the role of technological change as a key driver of economic development and the need for strategic management of innovation processes (Freeman, 1987).

From the perspective of strategic management, David Teece devotes significant attention to innovation, having developed the concept of dynamic capabilities. It explains how organizations can adapt to rapid changes in the external environment by integrating, building, and reorganizing internal and external competencies. This approach is particularly important for understanding the strategic management of innovation systems in conditions of high uncertainty (Teece, 2007).

Summarizing the contributions of the above-mentioned researchers, it should be noted that contemporary international scholarship views innovation systems as complex, multi-level structures whose effectiveness is determined by the quality of strategic management, the level of institutional interaction, and the ability to adapt in the face of global change. At the same time, existing approaches differ in their focus: some concentrate on the role of institutions, others on knowledge exchange processes, and still others on the strategic role of the state or enterprises.

An analysis of foreign studies indicates the absence of a single universal approach to managing innovation systems, which necessitates further research in the direction of a comparative analysis of global models of strategic management of innovation activities.

In domestic scientific literature, the issue of strategic management of innovation systems has also seen significant development, particularly in the context of Ukraine's economic transformation processes and its integration into the global innovation space. Ukrainian researchers focus on adapting global approaches to national conditions, as well as on developing an effective model of state innovation policy. Among the leading scholars in this field, O. Likhota, V. Heyets, and A. Chukhn deserve special mention.

Oleksandr Likhota has made a significant contribution to the development of research methodology for innovation systems by proposing a classification-based approach to analyzing global models of innovation management. His approach is based on the systematization of innovation systems according to key criteria, such as the level of government intervention, institutional structure, R&D funding mechanisms, the role of public-private partnerships, and the effectiveness of intellectual property protection. Using this approach allows for a comprehensive comparative analysis of innovation systems in different countries and an assessment of the effectiveness of their strategic management (Likhota, 2025).

Valerii Heiets made a significant contribution to the study of the institutional foundations of innovation development, viewing innovation as a key factor in the structural modernization of the economy. His works emphasize the need to formulate effective state policies aimed at supporting innovation, developing scientific and technical potential, and integrating Ukraine into the global innovation ecosystem. He pays particular attention to the role of institutions in ensuring the stability and predictability of innovation development (Heiets, 2018).

Anatoliy Chukhno explores the theoretical aspects of economic development and innovative transformation, viewing innovation as the foundation for the formation of a post-industrial economy. His works emphasize the importance of knowledge, technologies, and intellectual capital as key resources for modern development, as well as the need for a strategic approach to managing innovation processes (Chukhno, 2003).

Summarizing the approaches of Ukrainian researchers, it should be noted that they emphasize the need for an active role of the state in shaping the innovation system, developing the institutional environment, and integrating into global innovation processes. At the same time, unlike foreign approaches, domestic research pays more attention to the problems of a transitional economy, institutional instability, and resource constraints.

An analysis of the works of Ukrainian scholars indicates the formation of a national scientific school for the study of innovation systems, which combines the adaptation of international experience with an account of the specifics of Ukraine's socio-economic development. This creates a foundation for the further development of the theory and practice of strategic management of innovation activities.

The purpose of this article is to conduct a comprehensive study of the characteristics of strategic management of the U.S. innovation system in the context of global models of innovation management, as well as to identify the key factors ensuring its effectiveness and competitiveness in the current conditions of globalization.

Achieving this objective involves addressing a series of interrelated research tasks. First, a theoretical synthesis of contemporary approaches to the strategic management of innovation systems is conducted, specifically focusing on the concepts of national innovation systems, open innovation, and the role of the state as an active agent in innovation policy. Second, global models of innovation management are systematized using a classification approach, which allows for the identification of their main characteristics and institutional features.

Particular attention is paid to analyzing the U.S. model as an example of the effective combination of market mechanisms with elements of strategic public governance. The study examines aspects such as the level of management decentralization, the role of the private sector, mechanisms for funding research and development (R&D), the development of public-private partnerships, and the effectiveness of the intellectual property protection system.

In addition, the article aims to conduct a comparative analysis of the U.S. innovation system with other global models, specifically the European, Chinese, and Israeli ones. This approach allows for identifying common and distinctive features of strategic management of innovation activities, as well as determining the factors influencing the effectiveness of innovation systems under different institutional conditions.

Presentation of the main research material. Strategic innovation management is one of the key areas of modern management science, emerging at the intersection of strategic management theory, the innovation economy, and institutional analysis. In the current context of globalization, digitalization, and the transition to a knowledge economy, innovation serves not only as a driver of economic growth but also as a defining element of the long-term competitiveness of nations and companies. In this context, strategic innovation management is viewed as a systematic process of formulating, implementing, and monitoring management decisions aimed at ensuring the sustainable development of innovation activities.

The theoretical foundations of strategic innovation management are based on the classical principles of strategic management, according to which organizations and institutions must set long-term goals, take the external environment into account, and effectively utilize internal resources. However, unlike traditional strategic management, innovation management is characterized by a high level of uncertainty, risk, and dynamism, which necessitates the use of flexible and adaptive management approaches.

One of the key characteristics of strategic innovation management is its focus on the creation and utilization of knowledge as the primary resource for development. In this context, knowledge serves not only as the result of innovative activity but also as its prerequisite. This necessitates the development of effective knowledge management mechanisms, the development of human capital, and the promotion of research and development activities. Technology transfer processes and the commercialization of research results also play a significant role, facilitating the transition from scientific developments to practical application.

Modern approaches to strategic innovation management involve viewing innovation as an open system that operates in interaction with the external environment. This means that the effectiveness of innovation depends not only on the internal resources of an organization or the state, but also on the ability to integrate external knowledge, technologies, and investments. In this context, the concept of open innovation takes on particular significance, as it involves active interaction among various actors in the innovation process, including enterprises, research institutions, government agencies, and international organizations.

An important element of the theoretical foundations of strategic innovation management is the institutional approach, which views innovation activity as the result of the interaction of various institutions – formal and informal rules, norms, and organizations. The institutional environment determines the conditions under which the innovation system operates, influences the motivation of participants in the innovation process, and shapes the mechanisms for coordinating their activities. In this context, the role of the state as an institutional regulator, which creates the legal, economic, and organizational conditions for the development of innovation, is of particular importance.

A systematic approach to strategic innovation management deserves special attention; under this approach, innovation activity is viewed as a complex, multi-level system comprising various elements and the relationships between them. This approach allows for the interdependence of various factors in innovation development to be taken into account and enables a comprehensive analysis of innovation processes. In particular, this approach identifies such key components of the innovation system as the research and development sector, the entrepreneurial environment, innovation infrastructure, and public policy.

Furthermore, strategic innovation management requires consideration of the global context in which national innovation systems operate. Globalization leads to increased competition among countries for innovation resources, talent, and investment, which, in turn, requires the development of effective strategies for managing innovation activities. In this context, a comparative analysis of various models of innovation development is important, as it allows for the identification of best practices and their adaptation to national conditions.

Equally important is the aspect of strategic flexibility, which involves the ability of innovation systems to adapt to changes in the external environment. In today's environment of rapid technological development and high uncertainty, the success of innovation largely depends on the ability to respond quickly to new challenges and opportunities. This requires the implementation of adaptive management mechanisms, the development of dynamic capabilities, and the use of modern strategic analysis tools.

The theoretical foundations of strategic innovation management are formed through the integration of various scientific approaches, including systemic, institutional, and resource-based approaches. Their combination enables a comprehensive understanding of the mechanisms underlying the functioning of innovation systems and lays the groundwork for developing effective strategies for managing innovation activities at both the organizational and national levels.

The concept of National Innovation Systems (NIS) is one of the key theoretical and methodological foundations for the study of innovation activity and strategic innovation management. It emerged in the late 20th century as a response to the need for a comprehensive understanding of the processes

of knowledge creation, dissemination, and utilization within national economies. In today's context, this concept serves as a fundamental tool for analyzing the effectiveness of innovation systems and developing strategies for their advancement.

The essence of the concept of National Innovation Systems lies in viewing innovation as the result of interaction among various institutions, including government agencies, enterprises, research institutions, universities, and financial institutions. This approach allows us to move away from a linear model of innovation, in which the innovation process is viewed as a sequential transition from scientific research to commercialization, and toward an interactive model that involves constant interaction among all participants in the innovation process.

Within the NIS framework, particular attention is paid to the role of the institutional environment, which defines the rules of interaction among innovation actors. Institutions create conditions for knowledge exchange, stimulate innovation activity, and ensure coordination among the various participants in the system. An important element of the institutional environment is the legal framework, particularly the intellectual property protection system, which creates incentives for investing in innovation.

One of the key characteristics of national innovation systems is their structural diversity, which is determined by the historical, economic, and social characteristics of individual countries' development. This means that there is no universal model of an innovation system that would be equally effective for all countries. Instead, each country develops its own model that corresponds to its institutional conditions, level of economic development, and strategic priorities.

In this context, it is important to understand the role of the state as a key element of the national innovation system. The state acts as a coordinator, regulator, and investor, ensuring the creation of a favorable environment for the development of innovation. It defines strategic directions for development, funds basic research, creates an innovation infrastructure, and supports collaboration among various actors in innovation.

At the same time, the effectiveness of the national innovation system depends to a large extent on the level of development of the private sector and its ability to generate and implement innovations. In today's environment, enterprises are the primary drivers of innovation, as they are the ones that commercialize new technologies and products. Small and medium-sized enterprises, startups, and venture capital firms also play a crucial role, ensuring the dynamism and flexibility of the innovation system.

Within the NIS concept, special attention is given to the role of universities and research institutions, which serve as sources of new knowledge and technologies. In modern innovation systems, universities increasingly perform not only educational and scientific functions but are also actively involved in the commercialization of research results, collaborating with business and the government. Such interaction forms the so-called "triangular model" or "knowledge triangle" (university – business – government), which is the foundation for the effective functioning of the innovation system.

In the current context of global economic development, the concept of national innovation systems is undergoing a certain transformation linked to the processes of internationalization and globalization of innovation activities. The role of transnational corporations, international research networks, and global innovation platforms is growing, leading to the formation of supranational and regional innovation systems. This, in turn, requires the adaptation of national innovation management strategies to the new conditions of global competition.

An important direction in the development of the NIS concept is its integration with strategic management approaches. This involves using strategic analysis tools to assess the effectiveness of the innovation system, identify its strengths and weaknesses, and develop long-term development strategies. In this context, the innovation system's ability to adapt and transform in response to changes in the external environment takes on particular significance.

The concept of national innovation systems serves as a fundamental basis for the study of strategic innovation management. It allows us to view innovation activity as a comprehensive process involving the interaction of various institutions and provides a methodological framework for the comparative analysis of innovation systems across different countries in a global context.

The Open Innovation model is one of the most influential contemporary approaches to the strategic management of innovation activities, significantly transforming traditional notions of the processes of knowledge creation and commercialization. Unlike the classical closed innovation model, in which organizations rely exclusively on internal resources, open innovation involves the active use of external sources of ideas, technologies, and competencies. This approach allows for a significant increase in the effectiveness of innovation activities, a reduction in research and development costs, and the acceleration of bringing new products and technologies to market.

The essence of the open innovation model lies in the formation of open innovation ecosystems, within which various actors – companies, universities, research institutions, startups, investors, and government agencies – interact. In such a system, knowledge circulates freely among participants, creating conditions for synergy and the generation of new ideas. An important feature of open innovation is the two-way nature of knowledge flows: organizations not only draw on external ideas but also transfer their own developments to other entities through licensing, partnerships, or the creation of spin-off companies.

A key element of open innovation is the development of partnerships and networked collaboration. In today's environment, no single organization possesses all the necessary resources to support the entire innovation cycle, which necessitates cooperation. This is particularly relevant for high-tech industries, where the complexity of technologies and the speed of their development require the combined efforts of various participants. In this context, strategic innovation management involves establishing effective mechanisms for cooperation, managing partnerships, and coordinating the activities of participants in the innovation ecosystem.

Universities and research institutions, which serve as sources of new knowledge and technologies, play a crucial role in implementing the open innovation model. In today's environment, they are actively integrating into the business environment by establishing joint research centers, technology parks, and innovation clusters. Such collaboration facilitates the effective commercialization of research outcomes and enhances the overall level of innovation activity.

The development of venture capital and the startup ecosystem is of particular importance in the open innovation model. Venture capitalists provide funding for innovative projects in their early stages, taking on high risks, which helps stimulate the development of new technologies. Startups, in turn, serve as important sources of innovation, as they are capable of quickly adapting to market changes and implementing new ideas. In this context, strategic innovation management involves creating favorable conditions for the development of entrepreneurship and supporting innovative initiatives.

At the same time, the implementation of the open innovation model is associated with a number of challenges and risks. One of the key issues is the protection of intellectual property, as the open exchange of knowledge can lead to a loss of competitive advantages. This requires the development of effective mechanisms for managing intellectual property rights, as well as building trust among participants in the innovation ecosystem. Furthermore, coordinating the activities of a large number of participants is crucial, which demands a high level of managerial competence.

From a strategic perspective, the open innovation model is transforming approaches to the development of innovation strategies at both the corporate and national levels. In particular, it involves a shift from isolated innovation processes to integrated ecosystems focused on collaboration and knowledge sharing. This, in turn, requires the development of appropriate infrastructure, including innovation clusters, technology parks, business incubators, and platforms for interaction among participants in the innovation process.

In the context of globalization, open innovation takes on an international dimension, as innovation processes increasingly extend beyond the boundaries of national economies. International cooperation in science and technology, technology transfer between countries, and participation in global innovation networks are becoming key factors in enhancing the competitiveness of national innovation systems. This requires governments to formulate strategies aimed at integrating into the global innovation landscape.

The open innovation model is a key element of modern strategic management of innovation systems. It enhances the effectiveness of innovation activities by integrating internal and external resources, developing partnerships, and fostering innovation ecosystems. Its application enables governments and companies to adapt to the conditions of global competition and ensure sustainable innovation development.

The role of the state in innovation systems is one of the key elements of modern strategic management of innovation activities. In the scientific literature, the state is viewed not only as a regulator of economic processes but also as an active participant in the innovation system, shaping strategic development priorities, providing institutional conditions for innovation, and acting as a catalyst for technological change. In the current context of globalization and growing competition for innovation resources, the importance of government management in the field of innovation is significantly increasing.

Traditionally, the state's role in the innovation system has been limited to creating a regulatory framework, ensuring macroeconomic stability, and supporting basic scientific infrastructure. However, modern approaches to strategic innovation management expand these functions to include the state's active participation in shaping innovation markets, funding research and development, and stimulating entrepreneurial activity. This transformation of the state's role is driven by the need to respond to the complexity and riskiness of innovation processes, which often require significant investment and are long-term in nature.

One of the key areas of state participation in the innovation system is the funding of research and development (R&D). The state serves as the primary source of funding for basic research, which involves a high degree of uncertainty and is not always attractive to the private sector. At the same time, state support for applied research and development contributes to the development of new technologies and their subsequent commercialization. In this context, mechanisms such as grant funding, government programs, tax incentives, and innovation funds are crucial.

Equally important is the state's role in shaping an institutional environment that ensures effective interaction among various actors in the innovation ecosystem. This includes the development of the legal system, particularly intellectual property protection, the creation of conditions for the functioning of the venture capital market, as well as support for innovation infrastructure. Institutional stability and the predictability of government policy are important factors influencing the investment attractiveness of the innovation sector.

In modern innovation systems, the state also plays the role of a coordinator, ensuring the coherence of actions among various participants in the innovation process. This is particularly important in the context of a complex, multi-level structure of the innovation system, where government agencies, businesses, research institutions, and civil society organizations interact. Effective coordination helps avoid duplication of functions, improves resource efficiency, and ensures the achievement of strategic development goals.

One of the modern approaches to understanding the state's role is the concept of the "entrepreneurial state," under which the state acts as an active investor and initiator of innovation. In this case, it not only creates conditions for the development of innovations but also directly participates in financing high-risk projects, supports new technological directions, and generates demand for innovations through government procurement. This approach is particularly relevant in high-tech sectors, where the private sector is often unwilling to take on significant risks.

An important tool for implementing state innovation policy is the public-private partnership (PPP), which allows for the combination of state and business resources and expertise. PPPs facilitate effective risk sharing, attract investment, and enhance the efficiency of implementing innovative projects. Within such a partnership, the state can act as a co-investor, regulator, and guarantor of stable conditions for project implementation.

In a global context, the state's role in innovation systems varies depending on the chosen governance model. In some countries (for example, the United States), the state provides a favorable environment for the development of private initiatives, while in others (particularly China), it plays a dominant role in defining strategic development directions and allocating resources. The European model is characterized by a high level of coordination and institutional interaction, while the Israeli model is characterized by active support for the startup ecosystem.

At the same time, excessive state intervention can have negative consequences for the development of the innovation system, in particular leading to a decrease in resource efficiency, bureaucratization of processes, and restrictions on competition. Therefore, an important task of strategic management is to ensure an optimal balance between government regulation and market mechanisms. It is this balance that determines the innovation system's ability to adapt, develop, and integrate into the global innovation landscape.

The state plays a multifaceted role in the strategic management of innovation systems, acting as a regulator, investor, coordinator, and catalyst for innovation. The effectiveness of its activities is determined by its ability to create a favorable institutional environment, ensure support for innovation processes, and strike a balance between government intervention and market mechanisms.

The U.S. innovation system is one of the most developed and effective in the world, which explains its significant influence on global technological and economic processes. Its success is largely determined by the characteristics of strategic management, which combines market mechanisms with targeted government support, ensuring a high level of adaptability, flexibility, and innovative activity.

One of the key characteristics of the American model is the decentralized nature of strategic management of innovation activities. Unlike centralized systems, where major decisions are made at the national level, in the U.S. a significant portion of management functions is concentrated at the level of individual organizations, corporations, universities, and regions. This approach fosters a competitive environment in which various actors in innovation have the opportunity to independently determine development strategies and adapt to changes in the external environment.

A key feature of the U.S. model is the dominant role of the private sector in financing and implementing innovation activities. A significant portion of investment in research and development is carried out by private companies, which stimulates the alignment of innovations with market needs and ensures high resource efficiency. At the same time, the government plays an important supporting role by funding basic research and creating favorable conditions for the development of innovative businesses.

The development of venture capital, which provides funding for innovative projects in their early stages, is of particular importance in the strategic management of the U.S. innovation system. Venture capital funds play a key role in supporting startups, which facilitates the rapid adoption of new technologies and the creation of innovative products. A well-developed venture capital infrastructure allows for the effective distribution of risks and the attraction of investment into high-tech industries.

Another important feature of the American model is the close interaction between universities, research institutions, and business. Universities serve not only as centers of education and science but also as active participants in the innovation process, ensuring the generation of new knowledge and its commercialization. Technology parks, incubators, and accelerators also play a significant role, contributing to the development of the innovation ecosystem.

An important element of strategic innovation management in the U.S. is an effective intellectual property protection system. It creates incentives for investing in research and development and

ensures the protection of innovation outcomes. The existence of clear legal mechanisms promotes the development of the technology market and increases trust among participants in the innovation process.

Within the American model, the government also actively uses tools to stimulate innovation, including tax incentives, grant programs, and government procurement. Federal agencies play a special role by funding scientific research and supporting the development of priority technology areas. At the same time, government support is predominantly selective in nature and aimed at creating conditions for the development of innovations, rather than directly managing them.

Competition plays a significant role in the functioning of the U.S. innovation system, stimulating increased efficiency and innovative activity. A competitive environment facilitates the rapid diffusion of new technologies, the development of entrepreneurship, and the formation of new markets. In this context, strategic innovation management involves creating conditions for fostering competition and supporting innovative initiatives.

In today's environment, the U.S. innovation system is actively integrating into the global innovation landscape. International cooperation in science and technology, participation in global innovation networks, and the attraction of foreign investment all contribute to enhancing its competitiveness. At the same time, globalization creates new challenges, including increased competition from other countries and the need to adapt to rapid technological changes.

The strategic management model of the U.S. innovation system is characterized by a combination of decentralized management, an active role for the private sector, effective government support, and a well-developed innovation infrastructure. It is precisely these factors that ensure its high effectiveness and allow the U.S. to remain one of the world leaders in innovation.

In today's globalized environment, the effectiveness of national innovation systems is largely determined not only by internal development factors but also by the ability to adapt to global trends and integrate into the global innovation landscape. In this context, a comparative analysis of various models of strategic management of innovation activities takes on particular significance, as it allows us to identify their key characteristics, strengths, and weaknesses, as well as to determine the factors influencing the effectiveness of innovation systems.

The U.S. model is traditionally regarded as one of the most flexible and market-oriented. Its main characteristic is the decentralized nature of management, which ensures a high level of adaptability and innovative activity. Compared to other models, the American system is characterized by a significant role of the private sector, a developed venture capital infrastructure, and an effective system for commercializing innovations. At the same time, government intervention is predominantly selective in nature and aimed at supporting basic research and creating a favorable institutional environment.

The European model of strategic management of innovation activities is distinguished by a higher level of coordination and institutional interaction. In European Union countries, national and supranational institutions play a significant role in ensuring the coherence of innovation policy and the implementation of joint development programs. This approach promotes stability and predictability in innovation development, but it can reduce the system's flexibility and slow down the decision-making process.

The Chinese model of the innovation system is characterized by a high degree of centralization and an active role for the state in strategic management. The state identifies priority areas for development, provides large-scale funding for innovation projects, and controls key sectors of the economy. This approach enables the rapid mobilization of resources and the achievement of significant results in the short term. At the same time, excessive centralization can limit competition and reduce the effectiveness of innovation activities in the long term.

The Israeli model of the innovation system is an example of an effective combination of state support and entrepreneurial activity. It is characterized by a highly developed startup ecosystem, active

participation of venture capital, and significant integration into global innovation networks. The state plays a crucial role in creating favorable conditions for innovation, particularly through supporting startups, developing innovation infrastructure, and fostering international cooperation.

A comparative analysis of these models allows us to identify several key criteria for evaluating the strategic management of innovation systems. These include the level of government intervention, the nature of the institutional structure, mechanisms for funding research and development, the role of public-private partnerships, and the effectiveness of the intellectual property protection system. It is precisely these criteria that form the basis of the classification approach used in this study.

From the perspective of the level of government intervention, it can be stated that the U.S. model occupies an intermediate position between centralized and decentralized systems. It combines market mechanisms with targeted government support, ensuring a balance between flexibility and stability. The European model is characterized by a higher level of government regulation, while the Chinese model is characterized by state dominance in all key processes. The Israeli model, in turn, demonstrates an effective combination of government support and entrepreneurial initiative.

In terms of institutional structure, the U.S. model is characterized by a high degree of decentralization and autonomy among individual innovation actors. In the European Union, there is a more complex system of coordination between national and supranational institutions. The Chinese system is characterized by a rigid hierarchical structure, while the Israeli system is marked by flexibility and a high level of interaction among participants in the innovation ecosystem.

The mechanisms for financing innovation also differ significantly across models. In the United States, the private sector plays a significant role, providing the bulk of R&D investment. In the European Union and China, public funding dominates, while Israel exhibits an effective combination of public and private investment.

Thus, a comparative analysis shows that none of the models is universal, and their effectiveness depends on the ability to strike a balance between government regulation and market mechanisms. In this context, the U.S. model can be viewed as one of the most adaptive and flexible, allowing it to respond effectively to the challenges of the global economy and maintain its leadership position in the field of innovation.

The results of the comparative analysis provide a basis for further systematization of the characteristics of global models of strategic management of innovation systems.

In the current context of global economic development, innovation systems operate in an environment of high uncertainty, dynamic technological change, and intensified global competition. This necessitates the constant adaptation of strategic innovation management to new challenges arising from economic, technological, political, and social factors. The competitiveness of national economies and their positions in the global innovation landscape depend on the ability to effectively respond to these challenges.

One of the key strategic challenges is the acceleration of technological development, accompanied by rapid changes in technological paradigms. The emergence of new technologies, such as artificial intelligence, biotechnology, digital platforms, and quantum computing, is transforming the structure of the economy and requires innovation systems to demonstrate a high level of flexibility and adaptability. In this context, strategic management must ensure the timely identification of priority areas for development and the effective use of available resources.

Another important challenge is the globalization of innovation, which leads to increased competition among countries for access to knowledge, technologies, investments, and human capital. Transnational corporations, international research networks, and global innovation platforms are becoming key players in the global innovation market. This creates new opportunities for cooperation, but at the same time increases the risks of losing national competitive advantages.

Another significant challenge for innovation systems is the need to ensure effective collaboration among the various actors in the innovation process. In today's environment, innovations increasingly emerge at the intersection of different industries and fields of activity, which requires the development of interdisciplinary approaches and the integration of knowledge. This, in turn, requires improving the mechanisms for coordinating and managing innovation ecosystems.

Equally important is the challenge associated with the need to ensure sustainable development and address global issues such as climate change, energy security, and social inequality. In this context, innovation systems must focus not only on economic efficiency but also on achieving social and environmental goals. This requires the integration of sustainable development principles into strategic innovation management.

The digitalization of the economy also plays a significant role in shaping contemporary challenges, transforming traditional business models and creating new opportunities for innovation. Digital technologies enable rapid information exchange, the development of platform-based solutions, and the emergence of new markets. At the same time, they create new risks related to cybersecurity, data protection, and unequal access to technology.

In response to these challenges, innovation systems must develop new strategic approaches to management. One such approach is the development of dynamic capabilities that allow for rapid adaptation to changes in the external environment. This includes the ability to engage in continuous learning, implement innovations, and transform organizational structures.

The prospects for the development of innovation systems are linked to the further integration of national economies into global innovation networks. This entails active participation in international research projects, the development of technology transfer, and the attraction of foreign investment. In this context, it is important to formulate effective strategies for international cooperation that allow national interests to be aligned with global development trends.

The development of human capital as a key resource for innovation takes on particular significance. Education, science, and professional training must meet the modern demands of technological development and ensure the development of competencies necessary for working in a knowledge-based economy. Investment in human capital is an important prerequisite for long-term innovative development.

In the context of studying the U.S. model, it should be noted that its strategic advantages are linked precisely to its ability to respond effectively to these challenges. Flexibility, a decentralized management structure, a well-developed innovation infrastructure, and the active role of the private sector allow the U.S. to adapt to changes and maintain its leadership position in the field of innovation. At the same time, even this model faces new challenges that require continuous improvement of strategic management.

The strategic challenges of modern innovation system development necessitate a transition to more flexible, adaptive, and integrated management models. The prospects for the development of innovation systems are linked to the effective integration of government and market mechanisms, the development of innovation ecosystems, and active participation in the global innovation landscape.

The methodological foundation of this study is a combination of contemporary theoretical approaches to the strategic management of innovation systems, including concepts of national innovation systems, open innovation, and the role of the state as an active institutional actor. This interdisciplinary approach enables a comprehensive study of innovation activity as a multi-level management system.

A combination of general scientific and specialized methods was used in the study. In particular, a systems approach was applied, allowing innovation systems to be viewed as holistic structures with internal and external linkages. The comparative method was used to analyze the characteristics of strategic management of innovation systems in the United States, the European Union, China, and Israel.

The key methodological tool of the study is the classification approach to analyzing models of innovation management proposed by O. Likhota (Likhota, 2025). According to this approach, innovation systems are evaluated based on the following criteria:

- level of government intervention;
- institutional structure;
- R&D funding mechanisms;
- role of public-private partnerships;
- effectiveness of intellectual property protection.

The use of these criteria allows for the systematization of global models of innovation development and ensures their comparative analysis within a single methodological framework.

The analysis revealed that models of strategic management of innovation systems exhibit significant differences depending on the level of government intervention, the nature of institutional interaction, and the mechanisms for financing innovation activities.

To summarize the results, a comparative analysis of global models of strategic management of innovation systems was compiled (Table 1).

Table 1

Comparative analysis of global models of strategic management of innovation systems

Model	The nature of strategic management	Level of state intervention	Institutional structure	Mechanisms for funding R&D	The role of public-private partnerships	Key aspects of innovation management
USA	Decentralised strategic management	Moderate, predominantly selective	The significant role of the private sector, universities and venture capital	A combination of public funding for fundamental research and private investment	High	Flexibility, rapid commercialisation, and a focus on competition and the market
EU	Coordinated strategic management	Tall	Close cooperation between the state, universities and the business sector	The significant role of national and supranational programmes	High	Stability, regulatory consistency, focus on sustainable development
China	Centralised strategic management	Very high	The dominant role of the state and state-owned corporations	Predominantly state funding for priority sectors	Moderate	High concentration of resources, rapid mobilisation, strategic control
Israel	Entrepreneurial strategic management	Moderately high	Active collaboration between the state, start-ups, investors and global corporations	Government support for start-ups combined with private investment	High	Start-up ecosystem, high adaptability, international integration

Source: developed by the author based on the approach to classifying global models of state regulation of innovation proposed by O. Likhota (Likhota, 2025)

The analysis revealed that the U.S. model is characterized by decentralized strategic management, with market mechanisms playing a dominant role and the private sector playing a significant role. This structure ensures the system's flexibility, rapid adaptation to changes in the external environment, and effective commercialization of innovations.

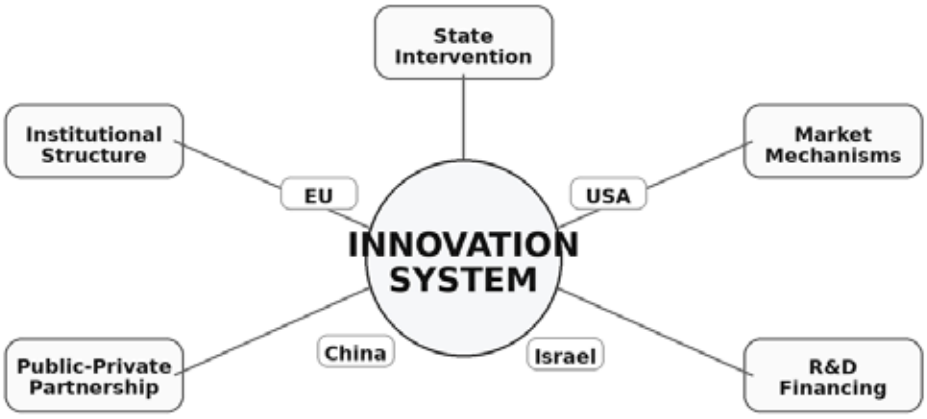
The European model, on the other hand, is based on a high level of coordination and a significant role for state and supranational institutions. This promotes stability and consistency in innovation policy, but may slow down decision-making.

The Chinese model demonstrates a high level of centralization and state control, which allows for the rapid mobilization of resources and the implementation of large-scale innovation projects. At the same time, such a system may limit the development of competition and entrepreneurial initiative.

The Israeli model is characterized by a high level of entrepreneurial activity, a developed startup ecosystem, and an effective combination of government support with private investment. This ensures a high level of innovation dynamics and integration into global markets.

To deepen the results of the comparative analysis, it is advisable to present a visualization of the positioning of global models of strategic management of innovation systems (see Diagram 1).

Diagram 1. Framework of Global Innovation Management Models Positioning of the United States, the European Union, China, and Israel



Source: developed by the author based on Likhota's framework (Likhota, 2025)

The diagram presented illustrates the conceptual positioning of key models of strategic management of innovation systems – those of the United States, the European Union, China, and Israel – within a generalized analytical framework.

The graphical interpretation clearly demonstrates the differences between the models in terms of the level of government intervention and the degree of market orientation of innovation activities. Within this coordinate system, the U.S. model occupies an intermediate position, confirming its hybrid nature: on the one hand, it is based on market mechanisms and private-sector dominance, and on the other, it provides for strategic state support for key areas of development.

The European model is positioned closer to the zone of heightened institutional regulation, reflecting the significant role of state and supranational structures in coordinating innovation policy. The Chinese model demonstrates a high level of centralization, confirming the state's dominant role in shaping and implementing innovation strategy.

The Israeli model, in turn, is characterized by high dynamism and an entrepreneurial orientation, reflecting its focus on the development of the startup ecosystem and venture capital financing.

Thus, the visualization confirms the results of the comparative analysis and reinforces the conclusion that the effectiveness of innovation systems is determined not only by the level of state intervention but also by the ability to ensure a balance between institutional support and market mechanisms.

The results confirm that the effectiveness of innovation systems is determined not only by the volume of resources but also by the quality of strategic management. A key factor is the ability to strike a balance between government regulation and market mechanisms, as well as to ensure effective interaction among the main actors in innovation.

The U.S. model demonstrates one of the most effective approaches to strategic innovation management, as it combines the flexibility of a decentralized system with targeted government support. This ensures a high level of adaptability and innovation activity.

At the same time, the study's findings indicate that none of the existing models is universal. The effectiveness of an innovation system depends on its ability to adapt to national conditions, account for institutional characteristics, and respond to global challenges.

The application of a classification approach has made it possible to systematize various models of innovation management and identify their key characteristics. This creates a foundation for further research and the development of effective strategies for managing innovation systems.

Conclusions. As a result of this study, a comprehensive analysis of the strategic management of innovation systems was conducted within the context of global models of innovation management, with a focus on the specific features of the U.S. model. The findings allow us to formulate a number of general theoretical and practical conclusions.

First, it has been established that strategic management is a determining factor in the effectiveness of innovation systems. Innovation activity in modern conditions cannot be viewed as a spontaneous or purely market-driven process, but requires purposeful management that ensures the coordination of actions among the main actors – the state, business, and the scientific and educational sectors. It is the quality of strategic management that determines an innovation system's capacity for sustainable development and adaptation to global challenges.

Second, it has been demonstrated that modern approaches to innovation management are based on the integration of various theoretical concepts, including national innovation systems, open innovation, and the concept of the entrepreneurial state. Their combination allows for the formation of a comprehensive understanding of the mechanisms of innovation system functioning and ensures effective strategic management at the national level.

Third, the study found that the U.S. innovation system model is one of the most effective in the world due to its combination of decentralized management, an active role for the private sector, and targeted government support. This model ensures a high degree of flexibility, rapid commercialization of innovations, and efficient use of resources. Of particular importance are a developed innovation infrastructure, an effective venture capital system, and intellectual property protection.

Fourth, the results of a comparative analysis of global models for managing innovation activities indicate that there is no universal model that could be effective for all countries. The European model is characterized by a high level of coordination and stability, the Chinese model by centralization and rapid mobilization of resources, and the Israeli model by an entrepreneurial orientation and high innovation dynamics. In this context, the effectiveness of an innovation system is determined by its ability to strike a balance between government regulation and market mechanisms.

Fifth, applying a classificatory approach to the analysis of innovation management models has made it possible to systematize them according to key criteria, such as the level of government intervention, institutional structure, R&D funding mechanisms, the role of public-private partnerships, and the effectiveness of intellectual property protection. This creates an opportunity for a comprehensive comparative analysis of innovation systems and the formulation of well-founded management decisions.

Sixth, it has been established that modern innovation systems operate under conditions of significant strategic challenges, among which globalization, digitalization, the acceleration of technological development, and the need to ensure sustainable development are key. Accordingly, strategic innovation management should be aimed at increasing the adaptability of systems, developing dynamic capabilities, and integrating into global innovation networks.

Seventh, the study's findings have practical significance for the formulation of effective innovation policy. In particular, they can be used to improve national strategies for managing innova-

tion activities, develop innovation infrastructure, stimulate public-private partnerships, and enhance the efficiency of resource utilization.

The present study therefore confirms that strategic management is a key factor in the development of innovation systems within a global environment. Further research should focus on a more in-depth analysis of the mechanisms by which innovation systems adapt to contemporary challenges, as well as on the development of tools for assessing the effectiveness of strategic management of innovation activities.

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DOI https://doi.org/10.30525/2592-8813-2026-2-13

MANAGEMENT AND THE ORGANISATIONAL AND ECONOMIC MECHANISM FOR THE RECONSTRUCTION OF POST-WAR UKRAINE: ISSUES OF THEORY AND PRACTICE

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Abstract. This article presents a comprehensive study of the theoretical and practical foundations of management and the development of an organisational and economic mechanism for the post-war reconstruction of Ukraine. The relevance of the topic stems from the extensive damage to the national economy, infrastructure and social sphere, which necessitates the implementation of effective management approaches and the latest public policy instruments. The essence of post-war management is analysed as a specific type of managerial activity aimed at restoring economic potential, stabilising socio-economic processes and ensuring the long-term development of the state. The key components of the organisational and economic mechanism are identified, including state regulation, financial and investment instruments, institutional support, public-private partnership mechanisms, and international technical assistance. It is demonstrated that institutional reforms, human capital development, the digitalisation of governance, and the attraction of foreign investment play a decisive role in the reconstruction process. As a result of the study, practical recommendations have been formulated regarding the improvement of reconstruction management, increasing the efficiency of resource use, and ensuring coordination between state bodies, business and international partners.

Key words: post-war reconstruction, management, organisational and economic mechanism, public administration, investment, institutional development, economic policy, Ukraine.

Introduction. Ukraine's post-war recovery is an extremely complex and multifaceted process, encompassing the economic, social, institutional and governance spheres. The extensive destruction of industrial infrastructure, the energy sector, transport systems and the housing stock, as well as significant human losses and forced population displacement, necessitate the development of fundamentally new approaches to managing the processes of national reconstruction. In these circumstances, the development of effective management and a robust organisational and economic mechanism capable of ensuring not only the restoration of lost potential but also the creation of the conditions for long-term sustainable development takes on particular significance.

The relevance of the topic is also determined by the need to rethink the state's role in the economy, strengthen the institutional capacity of public administration bodies, and ensure transparency in the use of resources derived from both domestic and external sources. In a context of limited financial resources and a high level of uncertainty, the effectiveness of management decisions becomes a key factor in the success of recovery. This requires the introduction of modern management tools, digital technologies, public-private partnership mechanisms and new models of coordination between the state, business and civil society.

Furthermore, Ukraine's integration into the European economic and legal area necessitates the adaptation of the national governance system to international standards and practices. Post-war reconstruction is viewed not only as a process of eliminating the consequences of destruction, but also as a unique opportunity for the structural modernisation of the economy, enhancing its competitiveness and shaping an innovative development model. In this context, research into the theoretical and practical aspects of management and the organisational and economic mechanisms of Ukraine's recovery takes on particular scientific and practical significance.

The issues of post-war economic recovery and the formation of effective mechanisms for managing these processes have been the subject of scientific research for a long time. Foreign scholars have made a significant contribution to the development of reconstruction theory by analysing the processes of economic reconstruction following large-scale military conflicts. Their works substantiate the role of state regulation, international aid, institutional reforms and investment in the reconstruction of national economies (Sachs, 2005).

A substantial body of research is devoted to the analysis of post-war reconstruction in European and Asian countries, where effective models of economic growth were established based on a combination of state governance and market mechanisms. In particular, reports by international organisations emphasise the importance of financial support, structural reforms and infrastructure development as key factors for successful recovery (World Bank, 2023). Significant attention has also been paid to the experience of transition economies, where the focus is on the need to ensure macroeconomic stability and establish effective institutions.

A significant contribution to the study of the institutional aspects of economic development has been made in works devoted to the role of institutions in ensuring the effectiveness of economic systems. These works demonstrate that the quality of the institutional environment is a determining factor in the success of reforms and recovery processes (European Bank for Reconstruction and Development [EBRD], 2023). The issues of globalisation-driven transformations and their impact on national economies are also examined in the context of the need to adapt public policy to new challenges.

Particular attention is paid to recent studies by international organisations on Ukraine's recovery, which assess the scale of losses, determine funding needs and outline strategic directions for reconstruction (World Bank, 2023). These analytical materials emphasise the need for a comprehensive approach that combines the economic, social and institutional components of development.

At the same time, despite a significant body of academic research, the issue of establishing a comprehensive organisational and economic mechanism for the post-war reconstruction of Ukraine remains under-researched. There is a need to develop integrated approaches that would combine the theoretical foundations of management with practical tools for their implementation in the context of contemporary challenges, particularly in terms of coordination between different levels of governance, the effective use of international aid, and the implementation of innovative management solutions.

Thus, the current state of scientific research on this issue indicates the need for further studies aimed at developing scientifically sound approaches to the management of post-war reconstruction in Ukraine.

The aim of this article is to provide a comprehensive theoretical justification and to develop practical approaches to the formation of effective management and an organisational and economic mechanism for the post-war reconstruction of Ukraine in the context of contemporary socio-economic challenges and transformational processes.

To achieve this aim, the following research objectives have been identified:

1. To analyse the theoretical foundations of the management of post-war economic recovery.

2. To elucidate the essence and structure of the organisational and economic mechanism for the reconstruction of the state.Дослідити роль інституційного забезпечення у процесах економічного відновлення.

3. To analyse international experience of post-war reconstruction and the potential for its adaptation in Ukraine.

4. To assess the significance of financial and investment instruments in supporting reconstruction processes.

5. To determine the role of public administration and public-private partnership mechanisms in economic recovery.

6. To formulate practical recommendations for improving the effectiveness of Ukraine's reconstruction management, taking into account current global challenges.

Main text. The study draws on academic works by Ukrainian and international scholars in the fields of economic development, public administration, institutional theory and post-conflict reconstruction. The research utilises monographs, articles in specialist journals, analytical reports from international organisations, as well as strategic documents concerning Ukraine's reconstruction.

Particular attention was paid to materials from international institutions such as the World Bank, the OECD, the European Bank for Reconstruction and Development, and the United Nations, which contain comprehensive assessments of the damage and recommendations for the reconstruction of Ukraine's economy.

Additionally, theoretical works by leading scholars in institutional economics and macroeconomic development were utilised, providing a fundamental basis for analysing the mechanisms of post-war reconstruction (North, 1990).

The research employed a range of general scientific and specialised methods for understanding economic processes.

The method of analysis and synthesis was used to reveal the essence of post-war recovery management and the structure of the organisational and economic mechanism. A systematic approach allowed us to consider the process of Ukraine's reconstruction as a holistic, multi-level system of interrelated elements of a state, economic and institutional nature.

The comparative method was used to analyse international experience of post-war reconstruction and to identify opportunities for adapting it to the Ukrainian context (Gorodnichenko et al., 2022). The economic-statistical method was used to summarise data on the scale of losses and the needs for economic recovery.

The method of generalisation and logical modelling was also applied, which made it possible to formulate conceptual approaches to improving the organisational and economic mechanism for Ukraine's reconstruction in the context of post-conflict transformation.

The study conducted allows us to assert that post-war management is a specific form of state and economic governance, which takes shape in the context of the destruction of the country's institutional, productive and social systems. Its key feature lies in the combination of anti-crisis, recovery and strategic development functions, aimed not only at eliminating the consequences of war, but also at creating a new model of economic growth.

From a theoretical perspective, post-war management is based on the principles of institutional economics, according to which the quality of institutions determines the effectiveness of economic development and the speed of recovery following crisis shocks (North, 1990). At the same time, the concept of sustainable development plays a significant role, as it envisages a balance between economic growth, social stability and environmental security.

An analysis of academic approaches shows that effective post-war management requires the implementation of the following fundamental principles: a systematic approach to governance, prioritisation of strategic planning, adaptability of management decisions, and institutional coherence. Of particular importance is the principle of coordinating actions between state bodies, local government, the private sector and international partners.

It should be noted separately that recent studies by international organisations emphasise the importance of establishing effective public administration as a key factor in the successful economic recovery following large-scale crises (Gorodnichenko et al., 2022). In this context, management is viewed as a tool for ensuring not only the reconstruction of infrastructure but also the modernisation of the economic system as a whole.

The theoretical foundations of post-war management form the basis for the further development of an organisational and economic mechanism for Ukraine's recovery, which is intended to ensure the transition from crisis management to the strategic development of the state.

The analysis conducted allows us to conclude that the organisational and economic mechanism for the post-war recovery of Ukraine is a multi-level system of interrelated instruments, institutions and management decisions aimed at ensuring the effective reconstruction of the national economy. Its formation is based on a combination of state regulation, market levers and international support, which ensures the comprehensive nature of the recovery processes.

A key element of this mechanism is the system of public administration, which determines the strategic priorities for reconstruction, the allocation of resources and the coordination of actions between different levels of government. In this context, the institutional capacity of the state is of great importance, as it directly influences the effectiveness of reconstruction programmes (North, 1990).

The second important component is the financial and investment mechanism, which includes public investment, international financial assistance, loans, grants and instruments for attracting private capital. According to analytical assessments by international organisations, it is the volume and effectiveness of investment that determine the speed of a country's economic recovery (World Bank, 2023).

The third structural element is the public-private partnership system, which ensures the involvement of the business sector in the processes of rebuilding infrastructure, the housing stock and production capacity. This approach helps to reduce the burden on the state budget and improve the efficiency of resource use (Gorodnichenko et al., 2022).

The fourth component is an international coordination mechanism, which involves cooperation with international financial organisations, the governments of partner countries and global development institutions. It plays a key role in ensuring financial stability and implementing best global practices for recovery (European Union [EU] et al., 2015).

The organisational and economic mechanism for Ukraine's recovery is a complex system, the effectiveness of which depends on the coordination of all its structural elements and their focus on long-term sustainable development.

An analysis of international experience in post-war reconstruction shows that the successful reconstruction of national economies is based on a combination of external financial assistance, far-reaching institutional reforms and strategic state planning. Historical examples from Western Europe and Asia demonstrate that the key factor in recovery is not merely the volume of resources, but above all the effectiveness of the management mechanisms governing their allocation and use (Gorodnichenko et al., 2022).

In particular, the experience of post-war reconstruction in European countries highlights the importance of large-scale investment in rebuilding infrastructure, industry and the financial system, as well as the active role of the state in coordinating economic processes. In these models, international aid programmes aimed at stabilising the economy and stimulating growth played a significant role (World Bank, 2023).

At the same time, theoretical approaches in institutional economics emphasise that the long-term success of recovery depends on the quality of the institutional environment, the level of legal protection of property rights, the effectiveness of public administration and the minimisation of corruption risks (North, 1990). This is confirmed by the experience of countries that were only able to achieve sustainable economic growth following profound institutional transformations.

For Ukraine, adapting international experience requires taking into account specific conditions related to the scale of the destruction, structural imbalances in the economy, and the need to implement reforms simultaneously across many sectors. Particular attention must be paid to establishing an effective system for coordinating international aid, ensuring transparency in the use of resources, and developing public-private partnership mechanisms (EU et al., 2015).

International experience confirms that successful post-war recovery is only possible through a comprehensive approach combining financial support, institutional reforms and effective management, which must be adapted to Ukraine's national conditions.

The practical implementation of Ukraine's post-war recovery processes requires the development of effective management tools to ensure coordinated interaction between state institutions, the business sector and international partners. In this context, the introduction of modern strategic management models focused on long-term planning and the effective use of resources is of key importance.

One of the priority areas is the digitalisation of the public administration system, which helps to increase transparency, efficiency and oversight of the implementation of reconstruction projects. The use of digital resource management platforms helps to minimise corruption risks and ensures prompt decision-making.

An important element of the practical recovery mechanism is the advancement of decentralisation, which involves strengthening the role of local communities in planning and implementing reconstruction. This approach allows for regional specificities to be taken into account and enhances the efficiency of financial and material resources at the local level.

A distinct role is played by the attraction of international investment and financial assistance, which is critical for the rapid restoration of infrastructure, housing stock and productive capacity. According to estimates by international organisations, it is the investment component that determines the pace of economic growth in the post-conflict period (World Bank, 2023).

Equally important is the development of innovation clusters and support for high-tech sectors of the economy, which lays the foundation for a transition to an innovation-driven development model. This allows not only for the restoration of the pre-war level of the economy, but also ensures its structural modernisation and increased competitiveness in international markets.

Thus, the practical aspects of Ukraine's recovery must be based on a combination of digitalisation of governance, decentralisation, investment support and innovative development, which together form a sustainable model of post-war economic transformation.

Conclusions. The study has established that the post-war recovery of Ukraine is a complex, multi-level process requiring a comprehensive approach to managing economic, institutional and social transformations. The effectiveness of this process depends to a large extent on the quality of the management structure and the organisational and economic mechanisms capable of ensuring the coordination of resources and actions of all stakeholders.

It has been demonstrated that post-war management is strategic in nature and combines anti-crisis and development functions aimed at restoring economic potential and forming a new model of sustainable development for the state. Its theoretical foundation is based on institutional economics and concepts of sustainable development, which define the key role of institutional quality and management effectiveness.

It has been established that the organisational and economic mechanism for Ukraine's recovery is a multi-component system comprising state regulation, financial and investment instruments, public-private partnerships, and international coordination. The coordinated functioning of these elements is critical to ensuring a stable and effective reconstruction process.

An analysis of international experience has shown that successful post-war reconstruction is possible provided there is a combination of external financial support, far-reaching institutional reforms and strategic public governance. At the same time, it is particularly important to adapt these approaches to Ukraine's national circumstances, taking into account the scale of the destruction and current challenges.

The practical findings of the study confirm the need for the digitalisation of governance, the development of decentralisation, the attraction of investment, and the implementation of innovative models of economic development. Implementing these measures will not only restore lost capacity but also ensure the structural modernisation of Ukraine's economy in the long term.

Thus, the approaches outlined can be used to improve public policy in the field of post-war reconstruction and to enhance the effectiveness of the management of socio-economic processes in Ukraine.

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THEORY AND INSTITUTIONS OF EDUCATION

DOI https://doi.org/10.30525/2592-8813-2026-2-14

HISTORICAL KNOWLEDGE AS A CORE COMPONENT OF PATRIOTIC CULTURE IN PRIMARY SCHOOL PUPILS

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Abstract. The article substantiates the decisive role of historical knowledge in shaping patriotic culture in primary school pupils. The author notes that between the ages of 6 and 10 children's interest in the past intensifies and this interest creates a foundation for the development of their worldview, historical consciousness, national identity and civic position. Through historical events, historical figures and examples of literature and art children comprehend their own self, gain social experience and shape their relationships with society. The paper particularly emphasizes the significance of museums as a unique pedagogical environment for acquiring historical knowledge. The museum space enables children to perceive historical facts not only at a cognitive level, but also at an emotional-value level influencing their feelings and allowing them to "experience" history. As institutions of social memory museums establish a link between the past and the present, serve the preservation and transmission of national cultural heritage. The author demonstrates that historical knowledge fulfills the educational, communicative and practical functions of patriotic culture by fostering respect for national values, attachment to the Motherland, civic responsibility and an active stance in children. In conclusion the historical learning process built on the cooperation between school and museum is evaluated as the most effective means for shaping historical consciousness, national identity and patriotic culture in primary school pupils.

Key words: historical knowledge, patriotic culture, primary school pupils, historical consciousness, social memory, cultural heritage, emotional-value relations, civic upbringing.

Introduction. A child's fascination with the past manifests itself from a very early age. A child aged 6–8 perceives the past as a magical world, and 9–10-year-olds also look at the past with wonder, but they no longer perceive past events as fairy tales. At this age, children begin to make valuable judgments based on analysis of what they read or heard. Developing historical knowledge in children of this age expands and shapes their scientific understanding of the past. By studying the history of their homeland and becoming familiar with its history, a child's historical knowledge expands not only spatially but also temporally, developing the child's ability to understand the past of all humanity beyond their own lives and the lives of those around them. Through historical events, historical figures, and images created by literature and art, young schoolchildren, as representatives of the younger generation, strive to understand their own self, the people around them, develop a unique behavioral pattern, and gain life experience. Drawing on the prism of historical knowledge and the social experience of previous generations, students immerse themselves in the social world of past years, studying not only history but also the system of social relations of past years, and through them, thanks to the active participation of the younger generation in the social environment, they come into contact with the relations of our changing modern era. Most of the republic's museums have accumulated significant experience in using various technologies to organize patriotic education for elementary school students. We believe that traditional culture, preserved in museums, is also of great importance in developing the foundations of patriotic culture. Museums, as a unique institution, provide an opportunity to showcase the country's history, accumulated over centuries, for educational and educative

purposes, and become the foundation for developing the foundations of patriotic culture in elementary school students.

The purpose of the article is to study the theoretical and pedagogical foundations of the formation of historical knowledge in young schoolchildren and the role of the museum environment in this process, as well as to determine the possibilities of the influence of historical knowledge on the development of patriotic culture and to substantiate effective ways of forming national identity, historical consciousness and civic position in children based on cooperation between the school and the museum.

Material and methods of research. To achieve the article's goal, the following research methods were used:

• Comparative analysis – comparing the approaches of various scholars and systematizing their conceptual views;

• Synthesis and generalization – formulating key conclusions based on the theoretical data obtained;

• Observation – monitoring children's behavior and activities in the museum environment from a pedagogical perspective;

• Pedagogical analysis – evaluating educational events held at the museum and their impact on patriotic culture.

Results and discussion. In the era of globalization and digital transformation, the preservation and development of national identity has become a strategic focus of education. From an early age, children are exposed to global information flows and are exposed to diverse cultural codes. Under these conditions, the systematic acquisition of historical knowledge is one of the key mechanisms for ensuring the sustainability of national and spiritual values.

French sociologist Maurice Halbwachs (1992, p. 244) noted that "collective memory is the fundamental condition for a society's self-understanding." This idea demonstrates that historical knowledge is not only information about the past but also a vehicle for social memory and national identity. Developing historical memory is especially important for young schoolchildren, as it is at this stage that the moral and emotional foundation of the individual is laid.

One of the main goals of the modern education system is to develop individuals as socially responsible and patriotic citizens with a sense of national identity. In the context of globalization and the rapid development of the information society, children are exposed to various cultural influences and are exposed to different value systems from an early age. This necessitates the targeted instillation of national and moral values and the systematic transmission of historical memory. In this context, historical knowledge acquires particular significance not only as a component of educational content but also as a moral and educational resource.

Historical knowledge is a mechanism of social memory, reflecting a nation's past, the stages of its formation, its cultural heritage, and the traditions of statehood. Social memory, in turn, is the foundation for self-awareness, resilience, and the determination of future directions for societal development. Developing this memory is especially important for young schoolchildren, as the period from ages 6 to 10 is the period when the moral and emotional foundations of personality are laid. During this period, children exhibit a strong interest in the past, empathize with heroes, and are receptive to national symbols.

Psychological research shows that primary school age is a stage in which concrete, figurative thinking predominates. Children perceive events with emotional resonance and connect facts they see and hear with sensory experiences. Therefore, the proper selection and presentation of historical material at this stage directly influences the development of their historical awareness, worldview, and civic stance. Through historical events and personalities, children not only acquire information but also develop moral criteria for choice, understanding the concepts of "good" and "evil," "justice" and "injustice" in a social context (Aliyeva, 2021, 168 p.).

Acquiring historical knowledge fosters the structural components of patriotic culture – national identity, a sense of belonging, a commitment to values, and social responsibility. Through literary and artistic examples, historical facts, and heroic stories, children better understand their own selves and establish an emotional connection with the past of their nation. This connection guides their relationships with society, laying the foundation for collective consciousness and civic engagement.

Enriching historical knowledge acquired in school with a practical and emotional environment is particularly important. In this regard, museums serve as a unique pedagogical space. The museum environment introduces children to historical facts through live exhibits, visual materials, and interactive presentations, allowing them to "live" the past. The museum experience is not limited to cognitive knowledge but also shapes emotional and value-based relationships. When a child sees, examines, and discusses a historical exhibit, they establish a connection between the past and the present, becoming a bearer of social memory (Bruner, 1996, 229 p.).

Thus, the comprehensive presentation of historical knowledge in school and museum settings has significant scientific and pedagogical significance for developing historical awareness, national identity, and patriotic culture in schoolchildren. This approach is strategically important not only for the transmission of knowledge, but also for preserving national and spiritual values, passing them on to future generations, and cultivating socially responsible citizens.

The theoretical analysis and pedagogical approaches demonstrate that the role of historical knowledge in developing patriotic culture in primary school students is complex and multifaceted. The key issue under discussion is that at this stage, patriotism develops not as an abstract ideological concept, but as an emotional and value-based attitude. Therefore, the presentation of historical knowledge is the primary factor determining its impact. According to psychological theories, primary school students prefer concrete images and a visual environment. From this perspective, the museum environment can be considered one of the most favorable pedagogical platforms for developing historical awareness. Direct observation of a museum exhibit, visual contact with a historical object, and the process of interactive explanation create not only cognitive interest but also emotional attachment in children. This emotional attachment serves as the primary psychological mechanism in the development of patriotic culture.

One important aspect to consider during discussion is the presentation of historical knowledge not only as factual information but also as a vehicle of values. If the learning process is limited to the transmission of chronological information, children may fail to develop a strong historical consciousness and national identity. Conversely, explaining the cause-and-effect relationships of historical events, emphasizing the moral qualities of historical figures, and connecting these qualities to contemporary life yields more effective results. On the other hand, the application of museum pedagogy requires specialized methodological training from the teacher. It is essential to purposefully plan the museum visit, link it to the curriculum, and organize a reflection phase after the excursion. Otherwise, the museum visit will be merely informative and will not fully realize its educational potential. Therefore, systematic and ongoing collaboration between the school and the museum is essential.

In the context of the issues discussed, it can be concluded that teaching historical knowledge within a museum setting is one of the most effective means of fostering a culture of patriotism. This approach strengthens children's sense of national identity, fosters social memory, and develops a sense of civic responsibility. At the same time, this model enhances students' cognitive activity, stimulating their analytical and creative thinking (Mehdiyev, 2012, p. 248).

Therefore, the discussion shows that a comprehensive presentation of historical knowledge, taking into account emotional value and practical activities, creates a real basis for a sustainable and conscious formation of a culture of patriotism in young schoolchildren.

From a psychological perspective, the age between 6 and 10 years corresponds to the stage of concrete operations. Swiss psychologist Jean Piaget demonstrated that at this age, children more easily grasp concrete and tangible facts than abstract concepts. Therefore, presenting historical know-

ledge through concreteness, visualization, and hands-on activities allows for a deeper understanding (Piaget, 1970, 182 p.).

American educator John Dewey (1938, p. 96) wrote, "Education is life itself." His concept of experiential learning underlies the theoretical model of museum pedagogy. In a museum, children not only hear history but also observe it, feel it, and experience it. This leads to more lasting knowledge acquisition.

Museums are socio-cultural institutions that act as a bridge between the past and the present. They preserve material and spiritual heritage and pass it on to future generations.

For example, the National History Museum of Azerbaijan visually presents to students the stages of Azerbaijan's development from ancient times to the present day. The archaeological finds, ethnographic materials, and historical documents presented here spark a keen interest in the past in children (Guliyeva, 2018, p. 156).

At the same time, the Azerbaijan Carpet Museum showcases the richness of national ornamental art and cultural heritage, fostering children's aesthetic taste and sense of national pride.

Direct observation of a museum exhibit stimulates an emotional response in children. They perceive historical facts not simply as information, but as a sensory experience. This contributes to the development of the emotional and value-based component of patriotic culture.

The pedagogical model of school-museum collaboration envisions collaboration in the following areas:

1. Thematic excursions – planned visits in accordance with the curriculum;
2. Museum lessons – interactive learning based on exhibits;
3. Project-based activities – student research and presentation preparation;
4. Creative activities – performance, drawing, and essay competitions.

This model enhances students' cognitive activity, shapes their attitudes toward historical events, and provides social experience (Abbasov, 2010, 176 p.)

Conclusions. Theoretical and pedagogical analysis shows that historical knowledge plays a system-forming and guiding role in the development of patriotic culture in primary school children. The period from 6 to 10 years is a sensitive stage during which the spiritual and emotional foundation of the individual is laid and the initial contours of national self-awareness are formed. Historical knowledge acquired during this stage becomes part of the child's worldview, defining their value system, social relationships, and future civic stance.

The development of historical awareness is not limited to the memorization of factual information. This process is characterized by the interpretation of past events, their understanding in a national and universal context, the evaluation of the actions of historical figures, and the transformation of these values into personal behavior patterns. For younger students, this transformation occurs primarily at the emotional and value level. They develop their own self-concept by figuratively perceiving examples of heroism, national traditions, and cultural heritage (Alizade, Makhmudova, 2013, 368 p.)

In this regard, the museum space has a special pedagogical significance. By presenting historical facts in a lively, visual, and interactive form, the museum environment awakens both cognitive interest and emotional attachment in children. Direct observation of exhibits, visual contact with historical objects, and explanations create a sense of "lived past" in children. This leads to a more sustained and conscious acquisition of historical knowledge and the strengthening of social memory in the individual consciousness.

An integrated learning model, built on collaboration between schools and museums, comprehensively develops all the key components of patriotic culture: national identity, a sense of belonging, respect for values, social responsibility, and active citizenship. Within this model, historical knowledge serves not only educational but also communicative (establishing a dialogue with the past), educational (developing moral qualities), and active (stimulating civic behavior) functions. At the same time, the use of museum pedagogy develops students' research skills, observation skills, ana-

lytical and creative thinking. They discuss exhibits, ask questions, develop hypotheses, and attempt to connect historical events with contemporary life. This process strengthens their social engagement and independent thinking skills (Ismailov, 2016, 190 p.).

Thus, teaching historical knowledge in a museum setting can be considered one of the most effective and promising approaches to fostering patriotic culture in primary school students. This approach promotes the preservation of national moral values, the continuity of public memory, and the education of future generations as responsible and conscientious citizens committed to national identity.

Similar forms of transfer of knowledge and experience are the subject of pedagogical studies, in the process of which the factors, mechanisms and regularities of the effective formation of the student's personality are studied. Historical knowledge of schoolchildren is one of the most important issues in the process of optimizing the formation of the foundations of patriotic culture and combines the following functions:

• educational – includes the accumulation of knowledge about the history, culture and religion of the country, the formation of value-oriented institutions and the experience of patriotic activity.

• communicative – familiarizing students with the communicative space with the aim of inculcating historical examples and helping them understand their role in forming an idea about the future.

• business – inclusion of historical knowledge in the active patriotic activity of schoolchildren (on the basis of historical knowledge, traditions, feelings of attachment to the Motherland, pride in its past, feelings of citizenship, preservation of the glory of the Motherland and its further strengthening).

Thus, historical knowledge obtained in the museum is especially important for the formation of the foundations of patriotic culture. Historical memories of heroic events in the history of the country, outstanding personalities and remarkable achievements of the country are imprinted in the memory of schoolchildren. In this format, the forms of patriotic activity of the personality are clearly shown. In this context, the desire to protect patriotic beliefs, feelings and behavior is formed among schoolchildren, the structural components of which are patriotic qualities and feelings.

In conclusion, we note that systematic and continuous collaboration between schools and museums in educational policy, the inclusion of museum lessons in the curriculum, and advanced training of teachers in museum pedagogy can improve the quality of patriotic education and have a long-term positive impact on the development of historical consciousness.

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DOI https://doi.org/10.30525/2592-8813-2026-2-15

DEVELOPMENT OF MULTICULTURAL COMPETENCE THROUGH COMMUNICATIVE ENGLISH LANGUAGE PRACTICES IN PRIMARY SCHOOLS

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Abstract. The article examines the impact of communicative English language practices in primary schools on the formation of multicultural competence in students. Foreign language teaching in the education system is of great importance in terms of developing students' intercultural communication skills. Descriptive, comparative and analytical methods were used during the study. The study analyzes the impact of the communicative approach on the formation of tolerance, empathy, respect for cultural diversity and global outlook of primary school students. It has been found that dialogues, role-playing games, group work, interactive tasks and the use of authentic materials have a positive impact on the development of both language and multicultural competencies of students. The article identifies the pedagogical importance of communicative English language practices and their application prospects in the modern primary education system.

Key words: communicative training, English language teaching, multicultural competence, primary education, intercultural communication, tolerance.

Introduction. In the modern era, globalization and the expansion of international communication processes have led to the formation of new pedagogical approaches in the education system. Foreign language teaching is no longer limited to teaching only grammatical knowledge and lexical units. In particular, since English acts as a means of international communication in the modern world, its teaching is of great importance in terms of developing students' intercultural communication skills (Byram, 1997).

The primary school period is considered one of the most important developmental stages in which students' social, psychological, emotional and communicative qualities are formed. During this age period, children's worldview, behavioral model, approach to social relations and communication skills are actively developing. Students acquire social skills such as cooperation, mutual respect, responsibility and collective action by establishing mutual relationships with their peers and teachers in the school environment. At the same time, the values and relationships formed at this stage form the basis for future personality development.

Since children perceive new knowledge and information more sensitively during the primary school age, it is of particular importance to develop their moral and social qualities in the right direction. At this stage, the formation of qualities such as tolerance, empathy, respect for different cultures, mutual understanding and social adaptation in students has a significant impact on their successful integration into society in the future. Students who gain information about different cultures learn to accept different ways of thinking, respect the views of other people and appreciate cultural diversity as social wealth.

Literature review. The issue of training future English language teachers in a competency-based education context is widely explored in contemporary pedagogical and methodological literature. Researchers emphasize the importance of developing communicative, intercultural, psychological, and professional competencies as the foundation for effective foreign language teacher training.

One key area of research is the theory of intercultural communicative competence. Byram (1997) views intercultural competence as the ability to effectively interact with representatives of other cultures, understand cultural differences, and use language in intercultural communication. This approach is an important component of the professional training of future English language teachers.

The theoretical foundations of the communicative approach were developed by Canale and Swain (1980), who identified the main components of communicative competence: grammatical, sociolinguistic, discursive, and strategic. Researchers have demonstrated that successful foreign language teaching is impossible without the development of practical communicative skills.

Methodological aspects of teaching foreign languages are thoroughly examined by Richards and Rodgers (2001), who analyze modern approaches and methods of language teaching. The authors emphasize the need to use interactive technologies, communicative tasks, and practice-oriented learning in teacher training.

Kramsch (1993) places particular emphasis on the relationship between language and culture, viewing language as a means of reflecting cultural identity. The author emphasizes that learning a foreign language is impossible without understanding the cultural context and the characteristics of intercultural communication.

The psychological and pedagogical aspects of student development are explored in the works of Vygotsky (1978), who studied the influence of the social environment and interaction on the development of higher mental processes. His theory of social constructivism has had a significant influence on modern educational approaches.

Intercultural communication issues are also addressed by Hall (1976), who analyzed the characteristics of cultural perception, communication, and behavior of representatives of different cultures. His research is important for the training of English language teachers in the context of globalization.

The psychological aspects of foreign language learning were explored by Dörnyei (2005), who emphasized motivation, personality traits, and psychological factors influencing learning effectiveness. Brown (2007) also emphasized the importance of cognitive, emotional, and communicative factors in foreign language acquisition.

Thus, an analysis of the scientific literature shows that competency-based education is based on the integration of communicative, intercultural, psychological, and methodological approaches, ensuring the effective preparation of future English language teachers.

The purpose of this article is to study the role of communicative practices of teaching English in primary school in the process of forming students' multicultural competence, as well as to determine the pedagogical effectiveness of interactive teaching methods for the development of intercultural communication, tolerance, empathy and respect for cultural diversity.

Main text. In the context of globalization, the expansion of mutual relations between different peoples and cultures has further increased the relevance of multicultural education. Therefore, the formation of multicultural values at school is considered an issue of social importance. Foreign language teaching, especially English lessons, creates wide opportunities for students to get acquainted with different cultures. Since English is an international means of communication, during its teaching, students not only acquire language skills, but also gain information about the culture, customs, lifestyles and values of different countries.

Communicative activities have a positive effect on students' use of language as a real means of communication and the development of their social and cultural skills. Through dialogues, role-plays, group work, projects and interactive activities, students learn to communicate, collaborate and accept different opinions in different social situations. This develops their communicative competence, empathy, tolerance and intercultural understanding skills.

Communicative English language practices also create conditions for the formation of self-expression and free thinking skills in students. Students learn to express their opinions on various topics,

hold discussions, and freely express their thoughts. This increases their social activity, strengthens their sense of self-confidence, and helps them adapt more successfully to future social relationships.

The application of communicative English language practices during primary school makes a significant contribution to the formation of students' multicultural worldview, social relationships, and personality qualities.

The communicative approach is considered one of the main pedagogical directions of modern foreign language teaching, and the main goal of this approach is to form students' skills in practical use of language in real-life situations. Unlike traditional language teaching models, this methodology prioritizes the application of language as a means of communication rather than just memorizing grammatical rules and mastering theoretical knowledge. Within the framework of the communicative approach, students participate in various communication situations, exchange ideas, establish dialogues, and learn to use language as a means of social interaction. This process creates conditions for the parallel development of students' speaking, listening, reading and writing skills. Within the framework of this approach, students not only learn the rules of the language, but also acquire the skills to communicate effectively in various social and cultural contexts (Brown, 2007). Communicative activities organized in foreign language classes provide students with the opportunity to recreate situations they may encounter in real life. For example, daily dialogues, group discussions, role-playing games, presentations and projects ensure the active participation of students and develop their free communication skills. Such activities strengthen students' self-expression, form the ability to express their opinions freely and help them build social relationships.

One of the important features of the communicative approach is its student-centered nature. In the teaching process, the teacher performs the function of a guide and facilitator rather than the main information transmitter. Students become active participants in the learning process. This also has a positive effect on the development of students' independent thinking, problem-solving and cooperation skills.

Communicative activities used in foreign language lessons also have a significant impact on the formation of intercultural understanding and a global worldview in students. Through authentic texts, videos, songs, dialogues and communicative tasks from different countries, students gain information about the cultures, customs, traditions, lifestyles and values of different peoples. This increases their interest in other cultures, helps to form a tolerant attitude and leads to a decrease in stereotypes.

Communicative activities also have a positive impact on the development of students' empathy skills. While recreating various social and cultural situations, students try to understand different ways of thinking and learn to respect the positions of other people. This makes a significant contribution to the formation of their multicultural competence and social adaptation skills.

Communicative language teaching is one of the main directions of modern foreign language methodology. The main goal of this approach is to form real communication skills in students. Richards and Rodgers characterized the communicative approach as “a teaching model aimed at mastering the social functions of language through practical communication” (Richards, Rodgers, 2001).

During the communicative approach, students act as active participants, participate in various dialogues, exchange ideas and apply the language in real communicative situations. This process helps students develop their speech skills, strengthen their self-expression and build social relationships.

The application of communicative methods in primary grades is carried out on the basis of more interactive activities in accordance with the age characteristics of students. Role-playing games, group tasks, songs, stories and visual materials increase students' motivation to learn a language and have a positive effect on their social and emotional development.

Multicultural competence refers to an individual's ability to understand, accept and communicate effectively with representatives of different cultures (Byram, 1997). The development of this competence in the modern education system is considered one of the important social and pedagogical goals.

The use of communicative activities in English lessons allows students to get acquainted with different cultures. Authentic texts, videos, songs and dialogues used in foreign language lessons provide students with information about the lifestyle, customs and traditions of different peoples and social behaviors. This leads to the expansion of their cultural worldview.

Role-playing games and group activities in particular have a positive effect on the development of empathy and tolerance in students. When students play different social roles, they better understand the behavioral patterns of representatives of different cultures. This process helps to reduce stereotypes and form a sense of respect for cultural diversity.

Kramsch notes that learning a foreign language is not only about mastering the structure of the language, but also about learning the cultural values that the language carries (Kramsch, 1993). In this regard, communicative English language practices play an important role in the formation of students' intercultural communication skills.

In primary schools, communicative English language practices are mainly organized on the basis of student-centered activities, and this approach is considered one of the effective pedagogical methods in the modern education system. The student-centered learning model ensures the active participation of students in the learning process, develops their independent thinking and free communication skills. Communicative activities serve not only to master language knowledge, but also to form students' social, emotional and multicultural competencies. During these activities, students learn to use language as a real means of communication, acquire the ability to express their ideas in various social situations.

The application of the communicative approach in primary grades is organized in accordance with the age characteristics of students. At this stage, game elements, interactive tasks and creative activities are of particular importance. Taking into account the psychological characteristics of students, methods are used that increase their interest in the learning process and ensure their active participation. Such an approach strengthens students' motivation to learn a foreign language and makes the learning process more effective.

Dialogues and work in pairs are considered one of the important tools in developing communicative skills. These activities develop students' fluency and enable them to use the language practically in real communication situations. Students simulate everyday life situations and learn various conversational models on greetings, introductions, shopping, school life, friendships, and other communicative topics. This enriches their vocabulary, develops correct pronunciation skills, and strengthens their self-confidence when speaking. Working in pairs also helps students develop their mutual cooperation and listening skills.

Group work and projects are one of the important components of communicative education in primary schools. During these activities, students learn to work together, exchange ideas and make collective decisions. Various project tasks develop students' creative thinking skills and have a positive impact on their ability to build social relationships. During group activities, students learn to respect different opinions, accept different points of view and create mutual understanding. This has a significant impact on the formation of their tolerance and empathy skills. Project-based activities increase students' sense of responsibility and develop their independent action skills.

Songs, stories, fairy tales and literary texts are considered important tools in terms of studying the culture of different peoples. The use of folklore examples, children's songs and cultural texts from different countries in foreign language lessons creates interest in other cultures in students. Through these materials, students learn about the customs, traditions, lifestyles, holidays and cultural values of different peoples.

The use of authentic materials during communicative activities is of particular pedagogical importance and is considered one of the important tools that increase the effectiveness of foreign language teaching. Authentic materials include videos, pictures, newspaper and magazine articles, short films,

podcasts, songs, announcements, dialogues and various interactive digital resources used for real communication in everyday life. These materials, unlike artificially prepared teaching texts, provide students with a real language environment and allow them to perceive the language in a natural communication environment.

Videos, pictures, short films and interactive materials from different countries increase students' interest in a foreign language and ensure their active participation in the teaching process. The use of visual and audio materials attracts students' attention more, makes the learning process more interesting and dynamic. Especially for primary school students, colorful and interactive materials are motivating and help them form a positive attitude towards language learning.

Authentic materials also play an important role in the development of students' listening and comprehension skills. Since students are familiar with real speech patterns, different accents and everyday forms of communication, they begin to perceive the language more naturally. Through these materials, students gain the ability to adapt to the speed of speech, intonation, emotional expression, and communicative behavior models. Authentic content presented on various topics has a positive effect on the enrichment of students' vocabulary and the development of speech skills. Authentic materials expand students' ideas about intercultural communication. Information about the lifestyles, customs, national holidays, daily rules of behavior, and social relations of different peoples forms a sense of interest and respect for other cultures in students. Through videos and cultural materials from different countries, students get acquainted with different worldviews and begin to understand cultural diversity more deeply. This has a significant impact on the development of their tolerance, empathy, and intercultural understanding skills.

The use of authentic materials is also of particular importance in terms of preparing students for a real communication environment. Since students encounter real language examples used in everyday life, they acquire the ability to practically apply a foreign language. This allows them to communicate more freely and effectively in an international communication environment in the future.

Digital technologies have further expanded the possibilities of using authentic materials. Thanks to Internet resources, online platforms and multimedia tools, teachers can integrate relevant and interesting materials from different countries into the teaching process. This also allows for a more interactive, modern and student-oriented organization of foreign language teaching.

Interactive games and digital platforms are considered modern teaching tools that play an important role in the development of communicative skills. Through digital platforms, students participate in a virtual communication environment, perform various interactive tasks and gain international communication experience. Online games, language applications and virtual classroom platforms create conditions for the development of both language and digital competencies of students.

Digital technologies expand students' individual learning opportunities. Students use additional materials through various platforms, independently practice language and develop their knowledge. The virtual communication environment allows them to connect with peers from different countries and gain real international communication experience. Thus, students develop a global outlook, tolerant attitude and multicultural competence more effectively.

Conclusion. Communicative English language practices in primary schools have a significant impact on the development of students' multicultural competence. Communicative activities develop students' tolerance, empathy, intercultural understanding and social communication skills.

The application of a communicative approach in the education system creates conditions for the formation of a more interactive and student-centered learning environment. The use of authentic materials and interactive activities in foreign language lessons has a positive effect on the development of students' global outlook and the formation of a sense of respect for different cultures.

Communicative English language practices act as an important pedagogical tool in terms of the development of multicultural education in primary schools.

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DOI https://doi.org/10.30525/2592-8813-2026-2-16

FEATURES OF THE IMPLEMENTATION OF NEW CREATIVE TECHNOLOGIES AIMED AT THE FORMATION AND DEVELOPMENT OF CREATIVE AND CRITICAL THINKING OF AN INDIVIDUAL

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Abstract. Today, in the era of the emergence of a highly developed industrial society based on information and communication technologies, Azerbaijani statehood, its individual institutions, and its education system face colossal historical challenges. The main goal of these tasks is to educate a noble, compassionate, tolerant, humane, fair and patriotic individual, an intellectual, and finally, an ideal citizen – the support of the national state, capable of living and acting in accordance with the specific requirements of modern global society. The education of a new person, thinking sensibly, critically, optimistically and progressively, completely free from all negative and transient elements, actions that degrade human dignity, superstitions, prejudices, extremism and fanaticism. To successfully complete this important task and achieve high results, a systematic and comprehensive education system based on progressive principles (humanization of education, differentiated approach to students, pedagogical tolerance. etc.) and advanced modern technologies operates in educational institutions of the Republic of Azerbaijan. The creation of a creative atmosphere for creative thinking of an individual, which is a prerequisite for the effective organization of the educational process, using advanced information technologies and pedagogical tools, determines the relevance of the presented article from both a scientific, technical and pedagogical point of view.

Key words: creative technologies, creative and critical thinking.

Introduction. The rapid transformations taking place in contemporary global society necessitate corresponding changes across all spheres of human activity, particularly within the field of education. The emergence of the information society, characterized by technological innovation, globalization, and knowledge-based development, has fundamentally altered the requirements placed upon modern individuals and educational institutions. In this new socio-cultural environment, education is no longer limited to the transmission of theoretical knowledge; rather, it has become a dynamic process aimed at developing creative, critical, analytical, and adaptive thinking skills capable of responding to the challenges of the twenty-first century. Under such conditions, the organization of the educational process exclusively through traditional teaching approaches no longer ensures the desired level

of effectiveness. Conventional methods frequently fail to sustain students' motivation, intellectual engagement, and active participation in the learning process, resulting in decreased academic performance and limited creative potential. Consequently, the modernization of education through the integration of innovative pedagogical approaches and advanced educational technologies has become one of the most urgent priorities of contemporary educational policy and practice.

The intellectual and cultural content of the modern world is continuously reshaped by progressive developments in science, technology, economics, and education. These global innovations penetrate all spheres of social life, transforming traditional forms of thinking, communication, and interaction. At the same time, the rapid expansion of information technologies and digital communication environments significantly influences social consciousness, national culture, linguistic systems, and patterns of human behavior. Such transformations require individuals to adapt to the principles and realities of the modern information society and to develop competencies that correspond to the creative and innovative spirit of the contemporary era. These processes are especially visible in education systems, where the need for the systematic implementation of innovative teaching technologies and modern pedagogical models has become increasingly evident. In this regard, the organization of educational activities based on interactive, student-centered, and technology-oriented approaches has acquired exceptional relevance and strategic importance for the sustainable development of society.

In the context of higher education, the application of creative technologies represents one of the most significant directions of pedagogical modernization. The integration of information technologies, digital educational resources, interactive teaching methods, multimedia tools, and critical-thinking-oriented pedagogical strategies creates favorable conditions for increasing students' cognitive activity, independent learning abilities, creativity, and problem-solving skills. Such approaches not only modernize the educational environment but also contribute substantially to the formation of intellectually developed, socially responsible, professionally competent, and innovative individuals capable of functioning effectively in rapidly changing social and professional contexts. The educational process, therefore, must be organized in a way that encourages students not only to acquire knowledge but also to critically analyze information, generate new ideas, collaborate effectively, and apply acquired competencies in real-life situations.

The relevance of the present research is further strengthened by the educational reforms implemented in the Republic of Azerbaijan during recent decades. Azerbaijan's accession to the Bologna Process on May 19, 2005, as well as the subsequent introduction of the credit-based education system and curriculum reforms, created fundamentally new conditions for the modernization of the national education system. The transition from traditional reproductive teaching models to active and interactive pedagogical approaches significantly changed the content, objectives, and methodological foundations of education. Issues such as learner-centered instruction, the development of critical and creative thinking, intellectual independence, and lifelong learning became central priorities within educational policy. Modern education began to focus on the formation of a personality capable of continuous self-development, rational thinking, innovation, and active participation in social and professional life. Under these conditions, the use of creative technologies in education has become not only a pedagogical necessity but also a strategic factor influencing the intellectual and cultural development of society.

The object of the research is the organization of the educational process in higher educational institutions of the Republic of Azerbaijan through the application of creative technologies, including information technologies, modern teaching tools, and pedagogical approaches aimed at developing critical and creative thinking. The subject of the research includes innovative teaching methods, interactive learning models, and personality-oriented educational approaches that contribute to students' intellectual development, educational competence, and progressive worldview formation. The primary objective of the study is to substantiate the effectiveness of creative technologies and innovative

pedagogical methods used in organizing educational activities in higher education institutions. In particular, the research seeks to demonstrate the positive influence of technologies stimulating creative and critical thinking on students' intellectual potential, academic competence, and personal development, while also developing a scientifically grounded methodological framework for the effective integration of modern educational technologies into university-level instruction.

To achieve these objectives, a comprehensive set of research methods was employed, including scientific-theoretical analysis of pedagogical literature, examination of educational standards and methodological materials, questionnaires, interviews, pedagogical observations, testing, and systems analysis of students' adaptation to innovative teaching methods. The theoretical and methodological foundation of the research is based on contemporary pedagogical theories, including personality-oriented education, activity-based learning, interactive pedagogy, contextual and problem-based teaching approaches, and theories related to educational informatization and digital learning environments.

The scientific novelty of the study lies in the theoretical and practical substantiation of the positive transformative impact of creative technologies and interactive teaching methods on the organization of educational activities in higher education institutions. The research proposes a conceptual model for the implementation of innovative educational technologies and scientifically justifies the effectiveness of interactive and information-technology-based teaching methods in enhancing students' intellectual and creative capacities. Furthermore, the study identifies new perspectives for the effective integration of advanced information technologies into the educational process and contributes to the modernization of pedagogical practices within the higher education system. Particular attention is devoted to identifying the mechanisms capable of stimulating students' creative energy, intellectual independence, and motivation for continuous self-improvement in the context of modern educational realities.

Discussion.

I. The essence and nature of new creative technologies used in the educational process of higher education institutions

Today, the intellectual and cultural content of a constantly changing and rapidly renewing world, accompanied by global reforms, is shaped by progressive innovations in science, education, economics, and technology. These innovations, corresponding to the spirit and demands of the era, in various forms persistently penetrate all spheres of human life and activity, changing its formal structure and internal organization. Innovations that actively impact traditional social and cultural norms, ways of thinking and mentality that have evolved over centuries require us to behave in accordance with the specific rules of the modern information society, adapting to the creative atmosphere and development trends that are actively changing the positive image of the world. All of this is most clearly evident in the modern domestic education system and requires from specialists working in this field extraordinary activity, and the widespread and consistent introduction of new teaching technologies into the pedagogical process. In connection with the above, the organization of various lessons and trainings in educational institutions based on new teaching methods has acquired particular relevance and has become an urgent need for the sustainable development of society. The rapid penetration of creative ideas into the modern education system has increased attention to such concepts as "creativity", "creativity"and "creative technologies". Since the beginning of the 21st century, under the influence of the inevitable process of globalization, the concept of "creativity" (lat. creatio – creation) has gained particular popularity among linguistic elements that have become firmly entrenched in our daily life and vocabulary.This word, which at first glance, due to its semantic structure, means "an act of creativity", is not in fact a synonym for the expression "creativity". If creativity is a natural result of relationships aimed at creating something new and constantly leading existence to positive development, then creativity is a set of qualities capable of realizing this creativity. In other words, creativity is the possession of adequate creative abilities. Thus, creativity is the ability of a person to reject standard ideas, useless rules, and patterns that limit and hinder progress, to translate original ideas into real-

ity, and to reveal the unique qualities of existence. In the creative process, the subject, experiencing an extraordinary mental and intellectual state, achieves the materialization of original ideas and the creation of various artifacts in various fields of activity – science, art, education, etc. Creativity arises as an act of organizing special and necessary conditions for creativity. As a result, the creative personality begins to acquire its essential characteristic – creativity (Kurysheva, 2011).Creativityis the combination of already known information in such a way that it becomes possible to create something new. Creativity expresses a content-creating whole, consisting of the unity of intellect and imagination, and creates opportunities for the subject to think and work with information in an extraordinary way, thereby destroying the stereotypes of familiar tools and templates and reaching a qualitative level with completely different dimensions (Anderson, L. W., & Krathwohl, D. R. (Eds.) (2001)

According to Merriam-Webster, Inc. (founded in 1831 by American linguist and lexicographer Noah Webster, 1758–1843), a new branch of Encyclopaedia Britannica, Inc. (founded in 1831 by American linguist and lexicographer Noah Webster, 1758–1843), published in the United States and billed as a new branch of Encyclopaedia Britannica, Inc. (founded in 1831 by the American linguist and lexicographer Noah Webster, 1758–1843), since 1964, the word “creative” was created in 1678.

The famous Austrian psychologist Sigmund Freud (1856–1938) argued that a subject who finds himself in a creative environment, “under threat” from this environment, realizes his secret desires in ways that are considered culturally acceptable. This idea applies both to individuals with unique talents and to people learning the mysteries of science in educational institutions, including students. American psychologist Joy Paul Guilford (1897–1987) conducted important scientific research on creativity and identified its characteristics. The following characteristics also emerge when students use creative technologies in their learning:

1. The ability to define a problem and understand its structure – in other words, having a specific perspective that reveals the presence of a particular problem in a subject.

2. The "running nature" of thought and reasoning, or the generation of ideas at a certain speed.

3. An original thinking style – the ability to devise new, fundamental methods for solving a problem.

4. Flexible thinking – the ability to find new associations and generate original ideas.

5. The ability to improve a specific object by adding appropriate details and synthesizing new ideas.

6. The ability to find solutions to a problem through analysis and synthesis and to use both old and new ideas in the solution process. The famous American psychologist Ellis Paul Torrance (1915–2003) argued that people, starting from the preschool period of their lives, constantly live in a creative atmosphere in one sense or another and react to it differently at each subsequent stage. Depending on the intensity of these reactions and the degree of activity of their impulses, each subject adapts to the creative environment in his own way and at a unique level. When this adaptation is of an extraordinary nature, when intellectual and spiritual freedom is achieved by overcoming all social and psychological limitations and stereotypes rooted in the imagination, the “act of creativity” known to us occurs. The main goal of lessons conducted on the basis of modern pedagogical standards and active learning is to create such an environment for students and to bring to a creative level the mental and intellectual potential that they carry within themselves, but cannot realize for one reason or another (Kapucu, S., Deniz, M., Culfa, G., Doğan, B., Turan, B., Yüksel, M. V., & Akdemir, A., 2019). E. Torrance argued that at this time, students move from the naive creativity inherent in preschool age (the ability to move away from mediocrity, manifested in one form or another, from patterns and stereotypes rooted in the subconscious) to its more complex and advanced forms – cultural (a cognitive condition that is prevalent in children due to lack of relevant experience), verbal (one of the forms of cognitive or perceptual creativity, manifested as the ability to move away from stereotypes as much as possible. For example, the ability to find verbal associations and put forward original ideas in a problematic situation), non-verbal (one of the types of cognitive creativity, expression of creative abilities

in the form of artistic images, descriptions, etc.), etc. It is precisely these opportunities, created for students at school through the use of creative technologies, that allow them in the future to reach a new level of creativity, to reach the point of "talent" (the act of creating great and brilliant creative products) (Dorfman, 2015). Thus, in order for students to be able to effectively use creative technologies in literature lessons in comprehensive schools of the appropriate level, it is necessary, first of all, to determine whether their behavior is adequate for the modern educational environment and to provide it with an appropriate structure. In this case, the participation of the following components in this process is especially important:

1) be prepared to study and deeply understand the material presented in class;

2) demonstrate a genuine interest in participating in the educational process;

3) be able to make the right choices regarding creative technologies in the educational process;

4) have a healthy temperament, determined by such criteria as optimism, enthusiasm and self-confidence. In addition, a student learning using creative technologies must be completely independent in his judgment regarding the subject of study and make maximum use of the power of his intuition. It should be noted that when using creative technologies in higher education institutions, a large number of psychological barriers may arise that hinder students' creativity for various reasons:

1. The functional isolation of the subject – the student's inability to leave his "comfort zone" (the area in which the subject feels most confident and safe, in other words, the situation in which the student feels psychologically protected) in the learning process.

2. Submission to internal censorship – activation of an internal mechanism that expresses the student's fear of making a mistake, being criticized, or becoming the object of ridicule.

3. The primary focus is not on the idea, but on the impressions it creates.

4. Disruption of the regime that determines the generation of ideas, for various reasons.

Organizing classes at universities across the country to enhance students' creative potential through the use of creative and information and communication technologies helps foster innovative, analytical, and critical thinking in the younger generation, and ultimately, the development of creative individuals. This process is carried out within the framework of systems such as "Theory of Descriptive Problem Solving" and "Continuous Development of Creative Thinking". These systems are multidimensional and encompass the preschool, school (primary, secondary, and tertiary), and post school periods of professional development. According to the author of this theory, the Soviet writer, science fiction writer and inventor Genrikh SaulovichAltshuller (pseudonym Genrikh Altov – 1926–1998), the formation of the image of a creative personality using modern technological resources and creative technologies should become the intellectual content of the modern information society (Effectiveness of TRIZ Invention for Enhancing Design Skills. (2025).Thetheory of descriptive problem solving is the teaching of descriptive (creative) problem solving, which makes it possible to find highly effective creative solutions in the educational process. Creative technologies encompass productive design, software, digital media based on electronic solutions, and modern advertising.

II. The nature and mechanisms of influence of modern educational technologies aimed at developing critical thinking

Among modern educational technologies widely used today in organizing the teaching of subjects in secondary schools, methods aimed at developing critical thinking play a special role and significance. The core essence of such technologies, their cognitive and pedagogical mission, is to enable students to penetrate the deepest layers of intelligence, understanding all objects and events from within, through the power of critical thinking, so that they can deeply understand the world and correctly evaluate truth. As can be seen, the cognitive foundations of the above-mentioned teaching technologies are aspects related to critical (analytical, synthetic, didactic, skeptical) thinking. Critical thinking is a system of mental judgment that analyzes objects and events from a critical perspective, strives to draw reasonable conclusions, adequately evaluate these conclusions, interpret them, make

reasoned verdicts on them, and finally apply the final conclusions to situations and problem solving. In a general sense, critical thinking is the highest form of cognitive ability and is manifested in a person's ability to question any information received, including their own beliefs. In a narrow sense, critical thinking means evaluating established values with the obligatory introduction of appropriate adjustments. It should be noted that the term "critical thinking" was introduced by the famous American philosopher and educator John Dewey (1859–1952). In his works, he presented this concept as "reflective thinking" and assessed it as "an active, consistent, and cautious approach to any belief" (Belski, I., Baglin, J., &Harlim, J, 2013).

To achieve high results when using modern learning technologies aimed at developing critical thinking, students must consider the following points:

1) The overall level of development of the student body;

2) The appropriateness of the creative environment and teaching methods to the age characteristics of the students;

3) The individual characteristics of the students;

4) The specific features and characteristics of the subject matter;

5) Positive learning motivations;

6) The individual and general interests of the students;

7) Students' creative activity;

8) The presence of a positive microenvironment within the team.

The main characteristics of critical thinking include the ability to actively observe, the ability to freely analyze, interpret and generalize, as well as the ability to correctly understand a situation and give it an adequate (both subjective and objective) assessment. It is precisely due to these properties that thinking includes logical elements in the learning process, relies on metaknowledge (knowledge about knowledge or knowledge engineering, special planning, modeling, various trainings and conceptual tools that involve modification of knowledge) and broad criteria of intelligence (clarity, accuracy, truth, depth, fairness, scope, significance) (Kadirov U, 2023).

The modern education system uses various technologies that serve to develop students' critical thinking, and their use has a special effect and forms various feelings, emotions and mental states in students from an emotional, psychological and intellectual point of view. The development of technologies used in organizing lessons in general education institutions and aimed at developing critical thinking is formed by three successive stages of the basic model involved in the educational process:

1. The recall stage – at this stage, the student's existing knowledge and ideas about the subject being studied are "recalled" and updated, personal interests are formed, and goals related to the subject are defined.

2. The stage of comprehension (understanding the essence) – at this stage, students become familiar with new information and systematize it. During this time, each student has the opportunity to reflect on the essence of the subject being studied, learn to compare existing and new information, and formulate appropriate questions. This helps students develop their personal perspectives, and they begin to independently comprehend the material being studied using various methods.

3. Reflection stage – at this stage, students consolidate the new knowledge they have acquired, make appropriate changes to their initial ideas about the subject, and incorporate new concepts into them.

With the above model, students master various ways of integrating information, acquire the ability to form personal opinions and express positions based on various ideas, concepts and acquired experience, learn to build a logical chain of conclusions and evidence, and are able to express their thoughts fluently, confidently and correctly in relation to the environment. In the first stage, called the "Call" or "Guide to Thinking," popular techniques such as "Association," "Memory Search," "Complete the Statement," and "Yes-No" are used to revive existing knowledge and ideas about the topic being

studied, to present simple arguments, proof of its relevance, as well as to "awaken" information about elements that exist a posteriori in the student's subconscious regarding a given topic.

What type of information will be contacted and based on what criteria will it be systematized at the "perception stage"? At this stage, the cognitive stereotypes formed in the educational environment regarding the title of the work begin to disintegrate, and the student looks at the subject being studied from a completely different perspective and begins to think about its nature in a different, more progressive and critical way. Thus, they acquire the ability to compare existing and new information and formulate appropriate questions. Building on this skill, students begin to express their personal position and independently comprehend the material being studied using various methods.

At the "stage of comprehension," the student consolidates the new knowledge he has already acquired about the work, makes adequate corrections and changes to his knowledge and initial ideas about the work, and also includes new concepts in them.

One of the widely used teaching methods today is the student-centered approach. Its application in the educational process is particularly relevant given the socio-political, moral, and cultural transformations taking place worldwide. To achieve these progressive goals, a student-centered approach to education is necessary. At the same time, the needs, capabilities, and inclinations of each participant in the educational process must be taken into account. Only then can the student be an active participant in the educational process alongside the teacher.

By applying a personalized approach to education, all components of education, including the natural goals of education, its content, methods, and technological techniques, are powerfully positively impacted. Thus, an adequate learning and development environment is created for students. The main value and importance of using the method of personal orientation in the educational process lies in revealing the unique individuality of each student. At the same time, the active environment created in the classroom is focused not only on students who are exceptionally active, but also on each student and their development, regardless of their individual mental and cognitive abilities, needs and interests.

Classes organized using the personal orientation method are conducted based on the principles of humanistic pedagogy and psychology. Among these principles, the following stand out as particularly effective: the principle of self-actualization; the principle of individuality; the principle of subjectivity; the principle of choice; the principle of creativity and achievement; the principle of trust, confidence and support.

From the above, an important conclusion follows that the personality-oriented method has a more pronounced positive impact on the differentiation and individualization of learning. However, it is also important to consider that when approaching the learning process from a person-centered perspective, individualization or personalization should be relative, not absolute. It should be noted that the use of the personal orientation method in the learning process opens up the following opportunities for teachers and students: creating interest and motivation in students for the learning process; increasing the cognitive activity of students; taking into account the individual characteristics of each student; directing educational work towards the development of cognitive abilities and creative activity of each student; creating conditions for the implementation of a flexible individual learning trajectory; differentiation and individualization of the educational process; creation of conditions for systematic monitoring (reflection) of the knowledge acquired by students; activation by the subject teacher of appropriate correction mechanisms during the educational process; monitoring the dynamics of student development.(Umarov B, 2021).

Creative technologies aimed at developing students' creative and critical thinking in the educational process also serve to democratize and humanize education. One of the most important elements that play a decisive role in the humanization of modern education is the promotion and agitation of universal human values during the teaching of humanities lessons. Thus, lessons based on creative technologies play a unique role in educating the younger generation in the spirit of humanism. Thanks

to them, students are introduced to the glorious pages of world history, developing their intellectual potential and acquiring a positive character through the example of historical events and outstanding personalities who are the driving forces behind these events, their way of life, behavior, and heroism, fair, courageous and noble images. In this way, they develop a positive essence within themselves, define an active civic position, and are raised in the spirit of love for the Motherland, sympathy for national culture and historical traditions.It should be noted that in the process of teaching humanities-oriented lessons, students develop adequate competencies and a code of dignity based on the synthesis of humanistic ideas, love for traditions and patriotic feelings.

Historical context is more than a collection of events, symbols, and numbers. It is a living, dynamic process. Millions of people participate in it, and their collective and individual destinies are being decided. Only by studying and understanding the historical process can we confidently determine what is true and what is false.Because history is also a life lesson, a faithful guide offering many alternatives for choosing the right path and a worthy way of life.Students of history witness the difficult and thorny path of humanity from primitive society to the modern information society, and at every step of this path they see wars and conflicts.Developing their analytical and critical thinking under the influence of historical narratives, scholars constantly attempt to identify the ideals to which humanity aspires. Ultimately, they cometo the conclusion that humanism, relevant in all historical periods, is the only and uncontested path to sincerity.When organizing and conducting lessons in the humanities, it is necessary to use active and interactive teaching methods – discussions, various role-playing games, project work – to increase the effectiveness of historical narratives.The use of such methods in the learning process allows students to gain a deeper understanding of historical events, further improving their ability to think analytically and critically, as well as to draw adequate logical conclusions.By studying the history of noble, just, compassionate, and courageous people, students develop a special attitude toward traditions, moral norms, socio-cultural prohibitions, sacred rules, and respect for the freedom and personality of others.These moments instill in students a sense of pride and responsibility for humanity, increase their confidence in the future, and encourage them to take an active stance in life, to be creative, kind, and virtuous.

Suggestions.

1. The topic of “creative technologies in education”, which has important social aspects, suggests the expansion of scientific research and a more in-depth study of the various components of a creative approach to learning.

2. The research topic discussed in the presented scientific article requires active scientific discussion among an even wider audience and ongoing study at the academic level as a subject of linguistic education for the younger generation.

3. The objects and events presented in a scientific article should be explored in more detail during further research. Therefore, all objects and events related to the main topic will be presented not as auxiliary elements, but as an integral part of the phenomenon being studied.

Conclusions. Today, creative technologies are actively used in the education system. Experts believe that students in general education who utilize the creative power of modern technology are exposed to such a unique influence that they begin to perceive the creative process in a completely different way. It's worth noting that, as in other areas of our lives, organizing the educational process based on digital rules has become commonplace. Continuous improvement of this system and the introduction of more effective methods into the educational process remain a requirement of the times. Thus, the large-scale implementation of information technology in the educational process takes student learning using the “Knowledge, Skills, Abilities” system to a new level of quality. During this time, the student, assimilating new knowledge in a creative atmosphere, develops adequate skills and abilities, intellectual and practical abilities, moral and spiritual convictions, ethical values, aesthetic views, and at subsequent stages, an appropriate worldview is formed, based on this knowledge. In this

regard, the results of experiments conducted in lessons organized using new creative technologies in the research process are summarized, and an adequate scientific assessment is given to individual elements of the newly formed teaching model. The importance of creating an adequate information environment for the functioning of the educational model created during the study, based on modern creative technologies, interactive learning and new teaching aids, was confirmed.

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DOI https://doi.org/10.30525/2592-8813-2026-2-17

WORLD LITERATURE TEXTS AS A PANACEA FOR TEACHING ENGLISH IN MODERN AZERBAIJANI UNIVERSITIES

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Abstract. This article addresses an interesting and relevant topic. It's no secret that numerous works have been published on English language teaching methods in schools and universities worldwide, including Azerbaijan, at the turn of the 20th and 21st centuries. However, to avoid being unfounded and following the principle of "one cannot embrace the infinite", the author of this work has deliberately narrowed the scope of the study to a brief overview of the role and significance of literary text in this area.

First, we would like to point out that this article contains several points that attract particular attention. First, we believe it will be of interest to people of various professions. Clearly, it is primarily addressed to university teachers. However, the informational material is distributed in such a way that it may also be of interest to psychologists, cultural studies scholars, historians, philologists, and linguists. Furthermore, as one reads the article, one can see that the author has thoroughly studied specialized pedagogical literature. Thus, in addition to sources taken from the internet, there are individual references to works published in the media. Moreover, as we see it, the cited works are always appropriate. Moreover, it is striking how logically continues various ideas of critics, drawing their own conclusions and generalizations. The work clearly demonstrates the significant contribution of educators to the problem under study. It is also significant that the data presented in the article and any generalizations made by the author correspond to specific facts, which, of course, enriches the presented article. It is written in a scholarly language that is at the same time quite accessible to ordinary readers.

Key words: Research Methodology, Universities of Azerbaijan, Literary Text, Authentic Text, English Language, Sentence, Context, Communication, Competence, Boomerang Method, Reading.

Introduction. Before beginning to study the fundamentals of grammar, syntax, and stylistics of modern English, an experienced university teacher sets a preliminary goal: what should be sought from Azerbaijani students first and foremost? Having established this goal for themselves, they will gain a clear and precise understanding of the language's teaching. It seems that the primary goal of teaching this subject in the republic's universities today is to define the correct approach to communication as a whole. This goal also encompasses various types of competencies, as well as levels of English language learning such as personal, cognitive, historical, factual, cultural, and so on.

We believe that setting such a goal dictates the solution of several related tasks. Among these, a significant one is the reliance on literary texts. This is understandable: literary texts, firstly, facilitate students' better understanding of authentic literature. Secondly, it serves as a "didactic unit", which in turn contains a set of features necessary for expanding the English vocabulary. Thirdly, this approach to teaching provides a minimum of informative material that encompasses the basic facts of speech production. Fourthly, it forms the basis for Azerbaijani students' verbal utterances. Finally, fifthly, it opens up broader scope for setting and resolving didactic-moralistic tasks. Clearly, their range is limited by the foreign language teacher's search for active learning methods. The five points we've listed are, of course, not strictly constant. They can be expanded if desired and necessary. However, they should be accepted as a working hypothesis and firmly established that, in modern English language teaching methods at Azerbaijani universities, reliance on literary texts of varying lengths has significant educational and practical value.

The main goal is to reveal the potential of the texts of world fiction in the teaching of English with Azerbaijani students.

Judging by all the materials, and especially the conclusion, it is clear that the goal of this work has been achieved. The enormous importance of using literary texts in teaching English is clearly perceived. Firstly, it helps to remember the rules more clearly; Secondly, it facilitates the process of understanding the main sections of linguistics; thirdly, literary texts help focus attention on key issues of foreign linguistics; fourthly, reading helps develop the skill of verbal expression. Almost all of these aspects (within the scope of this article, of course) are thoroughly covered.

Methods. In the article, the author necessarily relied on methods of encoding and decoding literary English-language texts, respectively and then summarizes the data in relation to the general educational process in Azerbaijani universities.

Results and Discussion. Summarizing the data of renowned educators from different periods regarding the topic of our article, we were able to establish at least three compelling reasons for the use of English-language literary texts in Azerbaijani universities today. A). Literature is, first and foremost, an authentic, valuable resource that serves a specific purpose set by the educator; B). The university educator is, first and foremost, the initiator of a critical approach to this type of text; C). Freedom to choose authentic information depending on the age of students.

For this reason, in the field of education in many countries of the modern civilization, including Azerbaijan, most researchers recognize the colossal role of fiction as a kind of catalyst for foreign language learning. “For foreign language learners to read, they have to be prepared to use various abilities and strategies they already possess from their reading experiences in their native language. They will need the knowledge they possess to help orient themselves in the many dimensions of language implicated in any text. Researchers have established that the act of reading is a non-linear process that is recursive and context-dependent. Readers tend to jump ahead or go back to different segments of the text, depending on what they are reading to find out” (Foreign Language Teaching Methods, 2026). Clearly, the word “foreign” in this case directly refers to English as an international language. This, incidentally, is evidenced by the literature we cited in English.

For example, Professor Aida Shahbazova made a significant contribution to the topic under study. Her monograph (Shahbazova, 1994) undoubtedly gave a very serious impetus to the use of literary texts. After the publication of this monograph in the national press, new and, it should be noted, active methods related to the sought-after problem emerged, began to develop and improve. For example, already in the 21st century, works of varying volumes appeared by S.R. Gaibova, A.O. Osmanzade, A.J. Pashayeva, L.F. Gahramanova, and A.N. Zeynalova. It is easy to see from the above that leading Azerbaijani scholars, methodologists, and practicing teachers devoted significant attention to the use of literary texts in English classes.

This inevitably begs the question: if we assert that, in today’s university environment, fiction texts are objectively a panacea and, at the same time, have been thoroughly studied, then where do we see even a grain of scientific novelty? To summarize: a critical analysis of existing specialized pedagogical and psychological literature leads us to the conclusion that many literary texts are presented there primarily in a generalized, schematic form. In other words, they significantly facilitate students’ learning of the basics of English directly in literature classes. The essence of the matter is that knowledge is studied at the level of a critical approach to individual genres. In other words, university classes are built on the basis of reading short, highly adapted short stories and novellas. Thus, lectures and seminars are conducted using specific examples, which in literary theory are traditionally referred to as “minor genres”. Meanwhile, it’s quite clear that the teaching of modern English at Azerbaijani universities is by no means limited to this topic. These texts also have unique applications in several other fields, such as economics, office work, tourism, sociology, and politics. It turns out that many gaps remain in these areas, requiring further research.

When writing and discussing the role of these texts in mastering modern English, the following question arises: how should we approach reading? It would seem that in everyday teaching, students read selected passages from a literary work of any of the aforementioned genres. As a side note, reading, at the teacher's discretion and without detriment to the curriculum in the "Foreign Languages" discipline, can be accompanied by a frontal survey to engage the general audience.

However, this is not an idle question. In our opinion, this dynamic of conducting a lesson during reading does not reveal its true nature. In reality, in the practice of teaching a foreign language, everything is more complex and not so straightforward. Reading at universities should not be made mandatory, as this would simply become a chore, turning it into a daily learning routine. Consequently, its nature, focus, and impact should be modified accordingly. We are convinced that the reading of literary texts at universities in Azerbaijan should be strictly oriented toward the student's choice of future profession. In other words, it is a direct and targeted reading of English texts directly related to the chosen specialty. While many controlled processes are focal, some, like child first language learning or the learning of skills without any instruction, can be peripheral (Brown, 1994, p.261)

How does this approach contribute? With the help of the teacher, students select specialized English texts for reading (and subsequent homework) that are, firstly, of interest to them and, secondly, useful, as they are likely to be useful in their future careers. Combining purely scientific interest with applied and, moreover, cognitive elements has great pedagogical significance. If this type of reading is promoted throughout the semester, the knowledge acquired by students, as modern researchers have established, will boomerang – and in a positive way. With this approach to reading English-language literary texts, students experience a unified and comprehensive socialization. In turn, progressively thinking educators today are transforming the "boomerang method" into lasting knowledge. The positive impact is clear.

As noted in modern pedagogical and psychological literature, the lack of a strictly focused approach to reading foreign-language texts "discourages the general student audience from acquiring solid knowledge due to its excessively suggestive (or, in other terminology, suggestive) impact on the learner's personality" (Secrets of the boomerang law: why our actions come back, 2026, p.8). It turns out that the so-called "boomerang method" in reading can have both positive and negative connotations. Much in this process depends on the purposefulness of this type of pedagogical action. Naturally, it also depends on the teacher's attitude, professionalism, and, more simply, their knowledge of the foreign language.

The second theoretical proposition (that is, the negative) always manifests itself in cases where the teacher's questionable attitude toward English language knowledge is much stronger than the linguistic information conveyed. Perhaps, during the chaotic reading of individual passages of a foreign-language literary text, the teacher's commentary on it is insufficiently clear and well-reasoned. Or perhaps the text is simply oversaturated with emotion, and its impact on the audience is short-lived.

The second approach is the opposite of the first. Purposeful reading is beneficial and informative because the selection of English-language fiction texts compiled by Azerbaijani students (either independently or with a teacher) allows them to memorize words, expressions, and even entire phrases/sentences, syntagmas, and semantic structures that they will use later. This type of reading also has another important nuance: dividing the text into separate fragments while maintaining the logical transitions from one paragraph to the next expands their subject matter. "Each novel, short story or play can spark off a wealth of different activities. Tasks and exercises based on a literary text can provide valuable practice in listening, speaking or writing, as well as improving reading skills. Literary works of all kinds are now becoming increasingly available in spoken form on cassettes. These can be especially useful in providing extensive listening practice. (Collie, Slater, 1987, p. 36).

A crucial characteristic of fiction from different eras is also the fluidity of its boundaries. The internal content (what writers call the plot) is never static. The organic integration of both linguistic

and extralinguistic realities into literary texts allows students to interpret and perceive both linguistic and extralinguistic worldviews in diverse ways. In other words, such a text inherently transcends spatiotemporal boundaries. Moreover, in the existential sense of the word, it is not constrained by cultural boundaries. It is important to remember that English-language literary works convey a variety of information. To a certain extent, this information can be controversial, problematic, and even contradictory. However, in foreign language teaching, this is not so much a drawback as an advantage, as it arouses students' lively interest, adding variety to the classroom. For example, a literary text can occasionally illustrate a particular meaning of a lexeme or expression, or a phrase as a whole. It can introduce irony and humor, support conversation among students, become a means of describing things and objects in real life, and stimulate students' reflection on a specific topic proposed by the teacher. Finally, literary text serves as an important tool for project creation. This is especially relevant at Azerbaijani universities, as most of them eliminated theses as of the fall of 2024. Of the independent projects in various disciplines, including English, only research projects remain. Furthermore, the volume and quality of the work depends on the profile of the Azerbaijani university (technical or humanities). We also note that integrating literary text is entirely acceptable at any stage of a university class, as well as as an independent study assignment.

It's time in our article to move from the theoretical principles outlined above to the practical side of the issue. We offer students at technical universities the following excerpt: "If you don't care about money, Sevda-dear, call it by its other names" – "Scrub? Or not? Try one true love?" – "Freedom, security, retribution". Students then take turns reading the text, then translating it (depending on their department) into Azerbaijani. Next, educators are encouraged to ask this question: "What do you associate money with?"

This question isn't asked solely to clarify its meaning in their native language. The accompanying methodological activity is more important. Specifically, we ask our students to name one lexeme at a time, using a frontal questioning system, without repeating them. What specifically does this assignment accomplish? First, it focuses students' attributive attention on each lexeme individually. Second, it helps expand their vocabulary. Third, it fosters students' ability to correctly construct an associative sequence of words, simultaneously extracting the desired relevant unit from them.

According to D.Tatzl, one possible way of employing literature in Teaching English for Specific Purposes is as input for small-talk activities. "For the simulation of a business dinner, for instance, literary quotations and short extracts related to food and drinks can be distributed on an accompanying handout to stimulate conversation and make students talk about literature in a playful way" (Tatzl, 2020).

Since the above sentence is related to the discipline of economics, we recommend interspersing the text with relevant technical business terms. For example, we use texts from English-language newspapers under the "Economic News" section or similar. For example: "Annual income ten pounds." Or: "annual expenditure eighteen pounds eighteen shillings and five pence." Or: "The town revenue arising from his university was big, and would have been scarcely sufficient to furnish him with daily bread". "He was satisfied with his wealth, but not proud of it", and so on, based on data primarily covering the topic of financing and developing business plans.

We have provided one typical example, which, judging by the topic, in our opinion, is appropriate for use in technical universities in our republic. In turn, for universities specializing in the humanities, it is more logical to rely, firstly, on literary works created in various genres. Secondly, to identify specific rules of English grammar, lexicology, and stylistics, etcs. The task is: in the following passage of speech, find and highlight foreign-language stylistic devices that represent the inner speech of literary characters. For example, in Faulkner's "The Sound and the Fury", in the original we read:

"They were coming toward where the flag was and I went along the fence. Luster was hunting in the grass by the flower tree. They took the flag out, and they were hitting. Then they put the flag

back and they went to the table, and he hit and the other hit. Then they went on, and I went along the fence. Luster came away from the flower tree and we went along the fence and they stopped and we stopped and I looked through the fence while Luster was hunting in the grass" (W. Faulkner "The Sound and the Fury").

The excerpt we've provided represents the expressed inner speech of one of the central characters in Faulkner's novel. After reading and transcribing this excerpt, an experienced university teacher is obliged to correctly guide students' thinking. Specifically, in the novel, one image, equivalent to one sentence, replaces another, yet the description of the character's actions corresponds to their internal perception of events. By identifying the syntagmas that directly and immediately express the character's inner speech, we document their entry into their consciousness. Thus, the focus is on the character's deeply personal perception of certain events and their subsequent evaluation. The skill of a teacher, both a professional with a perfect command of literary English (with adjustments for the vocabulary of a century ago, that is, the early 20th century) and a competent methodologist, lies in learning to accurately define a rule and simultaneously distinguish it from others. However, we suggest that such an approach is most logically implemented in English language teaching methods in literature classes. At the same time, the principle of studying inner speech using literary texts can also be applied to general linguistics classes. In this case, the teacher's primary focus should be on the lexical and semantic nuances of spoken language. Naturally, the content of the excerpt we've quoted is consistent with the speech the author is aiming for. In other words, the speech of the narrator and his character is essentially the same.

In connection with the above, another, equally important question arises: to what extent does a literary text reflect the truth of events or the characters' motives? After all, the principle we demonstrated using W. Faulkner's novel as an example is far from always and universally applicable.

In our opinion, the cited text represents a remarkable discovery by the scholar. In this case, the advantage of literary text (in addition to the above) also lies in the fact that students become more familiar with the connotations of individual lexemes and sentences that have not only a purely linguistic basis but also cultural significance. It is appropriate here to return to the very beginning of the article, where the primary purpose of English-language literary texts was discussed not only for linguists and language educators but also for representatives of related professions, particularly cultural studies scholars. This is all the more timely and relevant given the fact that the images that arise in students' minds while reading and critically analyzing this type of text sometimes go beyond the definitions found in explanatory dictionaries. Thus, the role and significance of the artistic text, incomparable with some other types, is noticeably expanded, and its content is even deeper (Carter, 2015).

Conclusions. This article allows us to draw several conclusions and generalizations. First, the regular use of literary texts of varying lengths in Azerbaijani universities significantly facilitates the accelerated learning of literary English. Second, an important part of the methodological concept we are exploring is the reading (or classroom reading) of individual fragments of this type of text. Third, it has a distinct advantage, as this type of text can be the subject of special development and during students' homework. Fourth, literary English text is a tool for teaching basic skills and abilities, which symptomatically include spoken language and reading. Finally, fifth, the cited examples from the periodical press and the annals of English fiction make it clear that this type of text is a reliable and highly productive means of developing communicative competence.

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DOI https://doi.org/10.30525/2592-8813-2026-2-18

FROM TRADITION TO INNOVATION: THE TRANSFORMATION OF SCHOOL TECHNOLOGIES IN AZERBAIJAN SINCE THE SECOND HALF OF THE 20TH CENTURY

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Abstract. In this work, I explore how school technologies in Azerbaijan have changed from the second half of the twentieth century to the present day. I focus on how traditional teaching methods gradually gave way to more innovative approaches, especially with the development of information and communication technologies. During the Soviet period, education was mostly based on standardized methods, with limited flexibility and a strong emphasis on discipline and memorization. However, over time, new ideas and tools began to appear, influencing both teaching and learning processes.

I also look at the period of independence, when Azerbaijan started implementing educational reforms and integrating modern technologies into schools. Digital tools, interactive methods, and student-centered approaches became more visible in classrooms. This shift was not immediate, but it developed step by step, reflecting both global trends and local needs.

In addition, I consider how teachers adapted to these changes and how students' roles evolved from passive listeners to active participants. In the end, the transformation of school technologies in Azerbaijan shows a gradual move from tradition to innovation, where modern educational practices continue to develop while still being influenced by historical foundations.

Key words: Educational innovation; school technologies; Azerbaijan education system; pedagogical transformation; ICT in education; digital learning.

Introduction. The development of school technologies in Azerbaijan reflects a broader transformation of the national education system over time. In the second half of the twentieth century, education was largely shaped by traditional approaches inherited from the Soviet system. Teaching methods were mostly teacher-centered, and the use of technology was limited to basic visual aids and printed materials. At that stage, the main goal of education was to provide standardized knowledge and maintain discipline in the classroom.

With the transition to independence, the education system began to change in response to new social, economic, and technological conditions. The introduction of innovative practices, especially in the field of information and communication technologies, gradually influenced how teaching and learning were organized. Schools started to adopt computers, digital resources, and interactive methods, which created new opportunities for both teachers and students. This shift also required a reconsideration of the teacher's role, moving from a knowledge transmitter to a facilitator of learning.

This study aims to examine how these changes have taken place and which factors have influenced the transformation of school technologies. Particular attention is given to the relationship between historical traditions and modern innovations, as well as to the ways in which global educational trends have been adapted to the local context. Such an approach makes it possible to interpret the development of school technologies not as a sudden shift, but as a gradual and continuous process shaped by multiple interconnected factors.

The issue of educational technologies and innovation has been widely discussed by different scholars. For example, Lev Vygotsky emphasized the importance of social interaction in the learning process, which later influenced the development of interactive and collaborative technologies in educa-

tion. His concept of the zone of proximal development (ZPD) supports the use of guided learning, scaffolding, and adaptive digital tools that assist learners in progressing beyond their current level of understanding (Vygotsky, 1978: 86). Contemporary online platforms, collaborative software, and intelligent tutoring systems can be seen as practical implementations of Vygotsky's theoretical framework, facilitating peer interaction and teacher mediation in virtual environments.

Another important contribution comes from John Dewey, who highlighted the role of experience and active participation in education. Dewey's philosophy of "learning by doing" encouraged educators to move away from passive transmission of knowledge toward more student-centered approaches. In the context of modern educational technologies, this perspective is reflected in project-based learning, simulation tools, and experiential digital environments, where students actively construct knowledge through engagement and reflection (Dewey, 1938: 25).

Furthermore, Jean Piaget's theory of cognitive development also plays a significant role in understanding the integration of technology in education. Piaget emphasized that learners actively construct knowledge through interaction with their environment. His stages of cognitive development suggest that technological tools should be aligned with learners' developmental levels. Educational software, interactive games, and multimedia resources can be designed to support cognitive growth by providing appropriate challenges and opportunities for discovery learning (Piaget, 1972: 45).

In addition, Seymour Papert, building on Piaget's constructivist ideas, introduced the concept of constructionism, which highlights learning through the creation of meaningful products. Papert advocated for the use of computers as tools for thinking and creativity, rather than mere sources of information. His work laid the foundation for programming-based learning environments and influenced contemporary approaches such as coding education, robotics, and maker spaces, which promote creativity and problem-solving skills (Papert, 1980: 52).

Moreover, the theory of connectivism, proposed by George Siemens and Stephen Downes, offers a contemporary perspective on learning in the digital age. Connectivism emphasizes the importance of networks, digital connections, and access to information as fundamental elements of knowledge construction. According to this theory, learning occurs through the ability to navigate, connect, and critically evaluate information across diverse digital platforms. It shifts the focus from individual cognition to distributed knowledge systems, where learning is seen as a process of forming and maintaining connections within networks. This perspective supports the use of online learning environments, social media, and open educational resources as essential components of contemporary education, enabling learners to access up-to-date information and engage in collaborative knowledge-building (Siemens, 2005: 5; Downes, 2012: 34).

In the Azerbaijani context, researchers such as Aida Huseynova and Fazil Mustafa have examined the modernization of the education system and the integration of information and communication technologies (ICT) into school practice. Their studies indicate that innovation in education is not limited to the introduction of technological tools; rather, it requires a fundamental transformation of pedagogical approaches, curriculum design, and teachers' professional competencies. They argue that the effective integration of ICT contributes to improving the quality of education, fostering student motivation, and developing digital literacy skills, which are essential in the contemporary knowledge society (Huseynova, 2016: 78; Mustafa, 2018: 112).

Furthermore, recent contributions by scholars such as Michael Fullan focus on educational change and reform processes in the context of globalization and technological advancement. Fullan emphasizes that successful innovation in education depends not only on the availability of technological resources but also on the readiness of teachers, institutional support, and continuous professional development. He highlights the importance of leadership, collaboration, and systemic change in implementing sustainable educational innovations. According to Fullan, meaningful change occurs when educators are actively involved in the process and when innovation is supported by clear policies and long-term strategies (Fullan, 2013: 56).

Additionally, the literature demonstrates that innovation in educational technologies is a complex and dynamic process shaped by both global theoretical frameworks and local educational practices. The integration of digital technologies requires not only technical infrastructure but also pedagogical transformation, teacher preparedness, and ongoing institutional support. These factors collectively determine the effectiveness and sustainability of innovation in contemporary education systems.

Methods and Approaches. In this work, I try to analyze the transformation of school technologies in Azerbaijan by combining several methods and approaches that help to understand both historical development and current practices. First of all, I rely on a qualitative approach, since it allows me to examine changes in education not only through numbers, but through ideas, experiences, and interpretations. At the same time, I include some statistical data to better illustrate how these changes are reflected in practice.

This study examines the transformation of school technologies in Azerbaijan through the application of several complementary methods and approaches that allow for a comprehensive understanding of both historical development and contemporary practices. The research is primarily based on a qualitative approach, as it enables the exploration of educational change not only through measurable indicators, but also through ideas, experiences, perceptions, and interpretations of key stakeholders. Such an approach is particularly relevant for understanding how technological innovations are integrated into teaching and learning processes, as well as how they influence pedagogical practices and institutional culture.

Within the qualitative framework, document analysis is employed as one of the main research methods. This includes the examination of policy documents, national educational strategies, curriculum frameworks, and official reports related to the development of information and communication technologies (ICT) in education. Through this method, it becomes possible to trace the evolution of educational policies and to identify the main priorities and directions of reform. In addition, academic publications and previous research studies are analyzed in order to situate the topic within a broader theoretical and empirical context.

Furthermore, a comparative approach is used to analyze the relationship between global educational trends and their adaptation within the Azerbaijani context. By comparing international practices with local implementations, the study seeks to identify similarities, differences, and specific challenges that arise in the process of integrating innovative technologies into the education system. This approach helps to reveal how global ideas are interpreted and modified according to national needs, cultural factors, and institutional conditions.

In order to complement the qualitative analysis, elements of quantitative research are also included. Statistical data, such as reports on the availability of digital resources in schools, levels of ICT usage, and teacher training indicators, are used to provide a clearer picture of how technological changes are reflected in practice. Although quantitative data are not the primary focus of the study, they serve to support and illustrate the findings derived from qualitative analysis.

Moreover, a historical approach is applied to examine the development of school technologies over time. This method allows for the identification of key stages, turning points, and factors that have influenced the transformation process. By analyzing both past and present developments, the study emphasizes the continuity of educational change and highlights the gradual nature of technological integration.

One of the main methods used in this study is the historical method. It allows for an examination of the development of school technologies from the second half of the twentieth century to the present day. By analyzing different stages, it becomes possible to compare traditional Soviet-era education with modern innovative practices. For example, during the late Soviet period, the use of digital technologies in schools was almost absent, whereas by the early 2000s, computer classes began to appear in many educational institutions. According to available data, by the mid-2010s, more than 70% of

schools in Azerbaijan had access to computers and internet resources, which demonstrates a significant shift toward technological integration.

In addition, a comparative method is applied. This method makes it possible to compare different periods, approaches, and models of education. For instance, teacher-centered lessons dominated in the past, where students mainly listened and repeated information. In contrast, contemporary education increasingly incorporates interactive methods, group work, and digital platforms. Some reports indicate that over 60% of teachers in urban schools regularly use digital tools such as presentations, online resources, and interactive boards in their lessons. Such comparisons facilitate a clearer understanding of the scale and nature of educational transformation.

Another important method employed in this research is document analysis. Educational policies, curriculum documents, and academic publications related to the development of education in Azerbaijan are examined in detail. For example, state programs on the informatization of education have aimed to equip schools with modern technologies and improve digital literacy. As a result of these initiatives, the number of students possessing basic computer skills has increased significantly over the last two decades. This method provides a solid empirical and contextual basis for understanding policy-driven changes in the education system.

The study also draws on theoretical approaches that explain how learning takes place. The socio-cultural approach, based on the ideas of Lev Vygotsky, helps to explain the role of interaction and collaboration in the learning process, particularly in technology-rich environments. At the same time, the constructivist approach, developed by Jean Piaget, emphasizes active learning and the importance of learners constructing their own knowledge through experience and engagement. These perspectives are particularly relevant in understanding the pedagogical implications of technological integration.

Furthermore, the concept of educational change proposed by Michael Fullan is considered in order to better understand the dynamics of innovation in education. Fullan argues that innovation requires not only the introduction of new technologies but also changes in teaching practices, institutional culture, and teacher attitudes. This perspective helps to explain why the integration of technology is often a gradual and complex process rather than an immediate transformation.

In conclusion, the combination of qualitative analysis, statistical data, and theoretical frameworks provides a comprehensive understanding of how school technologies in Azerbaijan have evolved from traditional methods to modern innovative practices.

Discussion and Results. This study examines how school technologies in Azerbaijan have evolved from traditional forms to more innovative and modern approaches. The analysis indicates that this transformation did not occur abruptly; rather, it developed gradually under the influence of historical conditions, educational reforms, and technological progress. During the Soviet period, education was highly structured, and technologies were limited to basic tools such as textbooks, blackboards, and visual materials. The role of the teacher was dominant, while students primarily followed instructions and reproduced knowledge.

With the transition to independence, the situation began to change. Educational reforms created opportunities for the introduction of new ideas, including the integration of information and communication technologies. Schools gradually introduced computers, internet access, and digital resources. This shift provided new possibilities for teaching and learning, while also presenting certain challenges. For example, not all schools were equally equipped, and the level of digital competence among teachers varied. As a result, the implementation of technology was not always consistent across different educational contexts.

The findings demonstrate that modern school technologies are closely associated with student-centered approaches. Instead of focusing exclusively on memorization, contemporary teaching increasingly emphasizes critical thinking, creativity, and collaboration. Digital tools such as presentations, online platforms, and interactive boards contribute to making lessons more engaging and dynamic.

At the same time, these tools require teachers to adapt their pedagogical methods and continuously develop their professional skills.

Another important finding is that innovation in education is not limited to the use of technology itself. It also involves changes in teaching philosophy and classroom interaction. The ideas of Lev Vygotsky regarding social learning and John Dewey's emphasis on learning through experience are reflected in modern educational practices, where students actively participate in the learning process. This demonstrates that technological innovation is closely connected with pedagogical innovation.

However, several challenges remain. Differences between urban and rural schools, limited resources in certain regions, and the ongoing need for professional development continue to affect the effectiveness of innovation. In addition, rapid technological change requires continuous adaptation, which can be demanding for both teachers and educational institutions.

Conclusion. This study summarizes the development of school technologies in Azerbaijan from the second half of the twentieth century to the present. The analysis shows that this process has been gradual and influenced by both historical traditions and contemporary demands. During the Soviet period, education was characterized by a strict structure, standardized content, and limited use of technology. Teaching was predominantly teacher-centered, and students were expected to follow clearly defined instructions with limited interaction.

Following independence, Azerbaijan initiated a series of educational reforms that created new opportunities for the integration of innovative technologies and teaching methods. Schools gradually adopted computers, digital platforms, and interactive tools, which significantly transformed classroom practices. Consequently, the role of the teacher evolved toward facilitating and supporting student learning rather than solely transmitting information.

At the same time, this transformation has not been without challenges. Unequal access to technological resources, variations in digital literacy, and the need for continuous teacher training have influenced the effectiveness of implementation. Despite these difficulties, the overall direction of development demonstrates a clear movement toward modernization and innovation.

It is also important to emphasize that innovation in school technologies extends beyond the introduction of equipment or digital tools. It is closely linked to changes in educational thinking and pedagogical approaches. Student-centered learning, collaboration, and critical thinking have become increasingly significant in modern classrooms. These developments reflect global educational trends while also being adapted to local conditions, thereby shaping the future of education in Azerbaijan.

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DOI https://doi.org/10.30525/2592-8813-2026-2-19

COMPARATIVE ANALYSIS OF THE IMPACT OF STRATEGIC PLANNING ON INSTITUTIONAL EFFECTIVENESS IN HIGHER EDUCATION INSTITUTIONS: THE EXPERIENCE OF AZERBAIJAN AND TÜRKIYE

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Abstract. Strategic planning has become an essential component of higher education governance in the context of globalization, technological transformation, and increasing international academic competition. Modern universities are expected not only to provide high-quality education but also to contribute to scientific research, innovation, socio-economic development, and international cooperation. In this regard, strategic management approaches play a significant role in improving institutional effectiveness, organizational sustainability, and governance efficiency. This study comparatively examines the impact of strategic planning on institutional effectiveness in higher education institutions within the experiences of Azerbaijan and Türkiye. The research analyzes strategic planning practices, governance structures, quality assurance systems, stakeholder participation, and institutional development processes in universities of both countries. The study employs a qualitative comparative approach based on academic literature, policy documents, and institutional reform analyses. The findings demonstrate that Turkish universities possess relatively more institutionalized strategic management systems due to long-term administrative reforms, accreditation mechanisms, and broader implementation of performance-based governance models. Azerbaijani universities, meanwhile, have accelerated modernization and internationalization reforms, particularly in areas such as digital governance, academic mobility, and quality assurance development.

The comparative analysis indicates that strategic planning positively influences institutional effectiveness by strengthening organizational coordination, improving decision-making processes, enhancing research productivity, and increasing international competitiveness. However, several challenges continue to affect the successful implementation of strategic management systems in both countries, including financial limitations, bureaucratic centralization, insufficient monitoring mechanisms, and limited stakeholder participation. The study concludes that effective strategic planning requires adaptive leadership, institutional flexibility, transparent governance, and continuous evaluation mechanisms.

Key words: strategic planning, institutional effectiveness, higher education governance, university management, Azerbaijan, Türkiye, quality assurance, strategic management.

Introduction. The contemporary higher education system is undergoing rapid transformation due to globalization, technological progress, international competition, and changing socio-economic conditions. “Universities today are expected to perform far beyond their traditional educational role. In addition to teaching, they are now actively involved in research, innovation, regional development, and international collaboration (Marginson, 2016).” As a result, strategic planning has become an important instrument for strengthening institutional performance and ensuring long-term sustainability in higher education. Universities are also increasingly required to respond to labor market expectations, encourage entrepreneurship, and contribute to knowledge-based economic development. These growing responsibilities make it necessary for higher education institutions to adopt more flexible, adaptive, and future-oriented management approaches.

Strategic planning can be understood as a structured process through which institutions determine their mission, vision, priorities, and long-term objectives while identifying the mechanisms needed to achieve them. Within universities, strategic planning plays an important role in improving coordination, supporting effective resource allocation, enhancing quality assurance systems, and

evaluating institutional performance. It also helps institutions respond more effectively to changing academic, technological, and social environments. At the same time, strategic planning encourages greater transparency in university governance and supports the establishment of clear and measurable development goals. Successful planning processes generally require cooperation among academic staff, university administrators, students, and external stakeholders.

Over the past two decades, both Azerbaijan and Türkiye have introduced significant reforms in their higher education systems. These reforms have mainly focused on improving educational quality, strengthening governance structures, increasing institutional autonomy, and aligning universities with international standards. Strategic planning has gradually become one of the central components of these modernization efforts. Although Azerbaijan and Türkiye share certain historical, cultural, and regional similarities, their experiences in strategic university management differ in several respects, including institutional development, administrative practices, and the implementation of educational policies. Turkish universities, in many cases, demonstrate more institutionalized strategic governance models, whereas universities in Azerbaijan continue to develop and modernize their management systems through ongoing reforms and international academic cooperation.

This study aims to provide a comparative analysis of the role of strategic planning in improving institutional effectiveness within the higher education systems of Azerbaijan and Türkiye. The research examines the extent to which strategic planning contributes to governance quality, academic productivity, organizational efficiency, and institutional sustainability. In addition, the study explores the common challenges faced by universities in both countries and discusses possible approaches for strengthening institutional competitiveness and supporting long-term development in the higher education sector.

Literature Review. Research on strategic planning in higher education has expanded considerably since the late twentieth century, particularly as universities began facing growing competition, financial pressures, and rapid social change. One of the early influential studies by Philip Kotler and Patrick Murphy (1981) emphasized that universities increasingly turned toward strategic management practices in order to adapt to environmental uncertainty and institutional competition. Later research further highlighted that strategic planning helps universities align their institutional missions with broader social, economic, and educational expectations.

At the same time, some scholars questioned rigid and highly bureaucratic planning models. Henry Mintzberg (1994), for example, argued that universities function in complex and dynamic environments where flexible and adaptive strategies are often more effective than strictly formalized planning systems. Despite these criticisms, many studies continue to show that well-designed strategic planning contributes positively to institutional coordination, accountability, and organizational effectiveness.

Research conducted by John M. Bryson (2018) demonstrated that strategic planning can strengthen institutional performance by clarifying priorities, improving stakeholder involvement, and encouraging evidence-based decision-making. Within higher education institutions, strategic management has also become closely connected with accreditation standards, quality assurance systems, and performance-oriented budgeting mechanisms.

In Türkiye, strategic planning in universities became more visible and institutionalized following reforms in public financial management and the introduction of quality assurance regulations. Over time, many Turkish universities incorporated strategic objectives related to internationalization, digital transformation, scientific productivity, and student-centered learning into their institutional development policies.

In Azerbaijan, strategic planning gained greater importance during the modernization of the national education system and the country's integration into the European Higher Education Area. Universities in Azerbaijan have increasingly focused on strengthening institutional governance, expanding research capacity, and developing international academic partnerships. Nevertheless,

researchers note that some universities still encounter challenges associated with implementation mechanisms, monitoring procedures, administrative capacity, and stakeholder participation.

Overall, the existing literature suggests that strategic planning can significantly improve institutional effectiveness in higher education. However, its success largely depends on factors such as leadership quality, organizational culture, financial resources, administrative experience, and the active involvement of institutional stakeholders.

Discussion.

Strategic Planning in Higher Education Institutions

Strategic planning in higher education institutions refers to the process of establishing a long-term institutional vision and developing systematic approaches for achieving sustainable growth, academic development, and organizational effectiveness. This process usually involves defining institutional missions and visions, conducting internal and external environmental analyses, setting strategic priorities, allocating resources, and establishing implementation and evaluation mechanisms. In modern universities, strategic planning extends far beyond administrative management. It directly influences teaching quality, scientific research, innovation capacity, digital transformation, and international cooperation activities. Recent studies suggest that universities with well-developed strategic planning systems demonstrate greater institutional adaptability and stronger organizational performance in rapidly changing educational environments (Albahari et al., 2023). Similarly, effective strategic governance helps universities define measurable objectives, strengthen internal coordination, and improve institutional competitiveness at both national and international levels (Elbanna et al., 2016).

Today, universities increasingly rely on strategic planning to strengthen academic competitiveness, improve research productivity, modernize digital infrastructure, and enhance their positions in international rankings. Strategic management also plays an important role in helping institutions respond to economic uncertainty, demographic changes, and technological transformation. In addition, strategic planning contributes to more efficient governance, academic quality enhancement, stakeholder coordination, financial sustainability, and organizational transparency. According to Janne Kettunen (2015), strategic planning improves institutional accountability and supports evidence-based decision-making processes within universities. Furthermore, participatory planning approaches encourage cooperation among academic staff, students, administrators, and external stakeholders, thereby strengthening institutional culture and organizational commitment. In recent years, the integration of digital governance systems and quality assurance mechanisms into strategic planning processes has also become increasingly important in university administration (Pucciarelli & Kaplan, 2016).

Despite these advantages, strategic planning may lose its effectiveness when it is treated merely as a formal bureaucratic obligation rather than a practical management instrument. In some higher education institutions, strategic plans remain largely symbolic documents with limited implementation capacity and weak monitoring systems. Researchers emphasize that insufficient communication, limited stakeholder participation, and a lack of institutional flexibility can negatively influence strategic management outcomes (Taylor & de Lourdes Machado, 2013). For this reason, successful strategic planning in higher education requires continuous assessment, adaptive leadership, active stakeholder engagement, and strong alignment between institutional goals and implementation practices. Universities that successfully combine strategic flexibility with a clear long-term vision are generally better positioned to respond to contemporary educational, technological, and organizational challenges.

Strategic Planning Practices in Türkiye and Azerbaijan

Strategic planning practices in higher education institutions have gained increasing importance in both Azerbaijan and Türkiye as universities attempt to respond to globalization, digital transformation, and growing international academic competition. In Türkiye, the role of strategic plan-

ning expanded considerably following public administration reforms introduced in the early 2000s. Universities were required to prepare institutional strategic plans aligned with national development goals, quality assurance standards, and performance-oriented governance systems. This process encouraged many Turkish universities to establish more structured and institutionalized planning mechanisms that include accreditation procedures, regular quality evaluations, stakeholder participation, and measurable performance indicators. Strategic plans prepared by Turkish universities often focus on internationalization, scientific productivity, digital transformation, sustainability, innovation ecosystems, and cooperation between universities and industry. Similar conclusions were highlighted in recent regional studies, which noted that strategic planning contributes to the modernization of higher education governance and supports the development of innovation-oriented educational systems (Hamidova & Ismayilova, 2026).

According to Gül and Salman (2018), strategic management practices in Turkish universities have positively influenced institutional accountability and organizational coordination. Likewise, recent studies suggest that quality assurance reforms and strategic governance models have strengthened competitiveness within the Turkish higher education system (Yılmaz & Temizkan, 2021). Turkish universities also increasingly prioritize interdisciplinary research, entrepreneurial university models, international research projects, and external funding opportunities within their long-term institutional strategies. These developments have improved the global visibility of several Turkish universities and expanded their participation in international academic networks.

The establishment of national accreditation agencies and quality assurance institutions has further strengthened evaluation mechanisms and administrative transparency in Turkish universities. Many institutions now integrate strategic performance indicators into budgeting systems, annual institutional reports, and managerial decision-making processes. Nevertheless, certain challenges continue to affect the system. Some universities still face problems related to bureaucratic centralization, financial limitations, and unequal institutional capacities between large metropolitan universities and regional institutions. Additionally, growing student populations and rapidly changing labor market expectations place additional pressure on higher education governance structures.

In Azerbaijan, reforms in higher education accelerated particularly after the country's integration into the Bologna Process and broader educational modernization initiatives. Universities increasingly view strategic planning as an important mechanism for improving institutional competitiveness, educational quality, and international academic visibility. Strategic priorities in Azerbaijani universities often include curriculum modernization, expansion of international cooperation, development of digital education infrastructure, enhancement of research capacity, academic staff development, and student-centered educational approaches. Several universities have established quality assurance departments and strategic development centers responsible for coordinating institutional reforms and monitoring implementation processes. Government policies supporting digitalization and internationalization have also encouraged universities to adopt more organized governance and planning systems (Mammadov, 2020).

However, compared with Türkiye, strategic planning mechanisms in Azerbaijan are still in the process of institutional development. Common challenges include limited monitoring and evaluation mechanisms, insufficient participation of academic staff and students in decision-making processes, resource limitations, and continued dependence on centralized administrative structures. Despite these difficulties, Azerbaijani universities have shown noticeable progress in recent years, particularly in the areas of international academic partnerships, student mobility programs, digital governance initiatives, and participation in global educational projects. The increasing emphasis on strategic management reflects Azerbaijan's broader objective of integrating its higher education system more closely into international academic and scientific networks.

Comparative Analysis of Institutional Effectiveness

Institutional effectiveness can be defined as the ability of universities to successfully achieve their educational, scientific, administrative, and social goals while adapting to changing academic, technological, and socio-economic conditions. In contemporary higher education systems, institutional effectiveness is strongly connected with academic quality, research productivity, governance efficiency, financial sustainability, stakeholder satisfaction, and international recognition. Strategic planning plays an important role in improving institutional effectiveness by supporting organizational coordination, efficient resource allocation, performance evaluation, and long-term institutional development. Research in the field of educational management indicates that results-oriented strategic management approaches positively influence both organizational performance and institutional effectiveness within higher education institutions (Hamidova, 2025). Universities with more structured strategic management systems are generally better equipped to respond to external challenges, improve academic outcomes, and strengthen institutional competitiveness (Pucciarelli & Kaplan, 2016).

A comparative analysis of Azerbaijan and Türkiye reveals several common trends in higher education governance and strategic modernization processes. Both countries increasingly prioritize quality assurance mechanisms, internationalization policies, digital transformation initiatives, and institutional development strategies. Universities in both systems actively seek to improve their positions in international rankings, enhance research capacity, and expand international academic cooperation. In recent years, technological innovation and digital governance have become especially important components of university strategic planning, particularly following the rapid development of online education and digital learning platforms.

Despite these similarities, differences remain in the level of institutionalization and implementation capacity within the higher education systems of the two countries. Turkish universities generally demonstrate more established strategic governance structures, broader experience with accreditation systems, and more systematic performance evaluation practices. Azerbaijani universities, meanwhile, continue to strengthen their institutional capacities through educational reforms, international partnerships, and modernization initiatives. Nevertheless, universities in both countries increasingly recognize that strategic planning is essential for achieving sustainable institutional development and improving long-term organizational performance.

To provide a clearer understanding of the similarities and differences between Azerbaijan and Türkiye in terms of strategic planning and institutional effectiveness, the following table presents a comparative overview of key governance and management indicators. The table highlights major institutional characteristics, ongoing development trends, and common strategic challenges observed within the higher education systems of both countries.

Table 1

Comparative Analysis of Strategic Planning and Institutional Effectiveness in Higher Education Institutions of Azerbaijan and Türkiye

Indicators	Azerbaijan	Türkiye
Institutionalization of Strategic Planning	Developing and expanding	More established and systematic
Quality Assurance Systems	Expanding through reforms	Institutionalized through accreditation mechanisms
Stakeholder Participation	Moderate participation of academic staff and students	Relatively broader stakeholder involvement
Performance Evaluation Systems	Limited in some universities	More systematic and measurable
Digital Transformation	Rapidly developing	More integrated into governance systems

Table 1 (continuance)

Internationalization Capacity	Growing international partnerships	Extensive international cooperation and mobility
Research Productivity	Increasing gradually	Relatively higher institutional research output
Administrative Autonomy	Partially centralized governance	Broader institutional autonomy
Strategic Governance Experience	Emerging institutional experience	Long-term strategic management experience
Main Challenges	Resource limitations and monitoring gaps	Bureaucratic centralization and institutional inequality

Source: Prepared by the author based on comparative analysis of higher education governance systems in Azerbaijan and Türkiye

Despite these similarities, significant structural and institutional differences continue to exist between the higher education systems of Azerbaijan and Türkiye. Turkish universities generally demonstrate more established strategic governance structures and broader institutional experience in performance management practices. The institutionalization of strategic planning in Türkiye has evolved through long-term public administration reforms, accreditation systems, and national quality assurance frameworks. According to Yılmaz and Temizkan (2021), Turkish universities increasingly incorporate performance indicators, quality evaluation mechanisms, and stakeholder participation into their administrative decision-making processes. Moreover, universities in Türkiye often benefit from relatively broader administrative autonomy, allowing them to implement institutional strategies with greater flexibility and efficiency.

In contrast, universities in Azerbaijan are currently experiencing an intensive modernization process aimed at aligning higher education governance with international academic standards. Quality assurance systems, digital learning infrastructure, and international cooperation initiatives continue to expand across Azerbaijani higher education institutions. However, in some areas, strategic planning systems are still developing institutionally, particularly regarding implementation monitoring, performance evaluation procedures, and stakeholder involvement in decision-making processes. Several universities also continue to face challenges related to centralized governance structures and limited institutional resources. Despite these difficulties, Azerbaijani universities have demonstrated noticeable progress during the last decade in areas such as academic mobility, international partnerships, digital governance, and participation in global educational initiatives (Mammadov, 2020).

The findings of the study further indicate that institutional effectiveness increases considerably when strategic objectives are realistic, leadership approaches are participatory, monitoring systems function efficiently, and stakeholders actively contribute to institutional decision-making processes. Universities that successfully integrate digital governance technologies, data-driven management systems, and transparent quality assurance mechanisms tend to achieve stronger organizational performance and greater academic competitiveness. In this context, effective leadership and institutional flexibility play a particularly important role in supporting sustainable development and long-term strategic success within higher education institutions.

Therefore, strategic planning should not be perceived merely as a formal administrative requirement. Rather, it should be understood as a dynamic management instrument that promotes innovation, institutional sustainability, organizational adaptability, and continuous improvement in higher education systems.

Challenges and Recommendations for Improving Strategic Planning in Higher Education Institutions

Despite the increasing importance of strategic planning in higher education institutions, a number of challenges continue to affect the effective implementation of strategic management processes

in both Azerbaijan and Türkiye. One of the major difficulties is financial limitation. Insufficient funding often restricts universities from carrying out long-term strategic projects, modernizing infrastructure, expanding research capacity, and investing in advanced digital technologies. Limited financial resources may also negatively influence academic mobility programs, innovation initiatives, and the development of international academic partnerships. As a result, many universities are sometimes forced to focus primarily on short-term operational needs rather than long-term institutional development priorities.

Another significant challenge involves bureaucratic and centralized governance structures. Excessive administrative centralization can reduce institutional flexibility, slow decision-making processes, and limit the ability of universities to respond quickly to changing educational and technological conditions. In some institutions, administrative procedures remain highly formalized, which may weaken innovation capacity and organizational adaptability. At the same time, insufficient monitoring and evaluation mechanisms create additional difficulties in assessing the effectiveness of strategic plans. Some universities still lack clear performance indicators, data-driven evaluation systems, and continuous implementation monitoring processes. Consequently, strategic plans may remain largely formal documents without producing substantial institutional impact.

Limited stakeholder participation also represents an important problem. Insufficient involvement of academic staff, students, researchers, industry representatives, and external stakeholders can reduce institutional commitment to strategic goals and weaken organizational cooperation. Effective strategic planning requires transparent communication and active participation from all institutional actors. Furthermore, rapid technological transformation places additional pressure on universities. Higher education institutions are expected to adapt continuously to artificial intelligence technologies, digital learning environments, online education systems, cybersecurity requirements, and changing labor market expectations. Universities that fail to respond effectively to technological developments may gradually lose competitiveness within the global academic environment.

To strengthen institutional effectiveness through strategic planning, universities should further develop participatory governance models and encourage broader stakeholder involvement in decision-making processes. The expansion of digital governance systems and data-based administrative practices can contribute to greater organizational efficiency, transparency, and institutional accountability. Increasing institutional autonomy together with effective accountability mechanisms may also support more flexible and innovative governance structures. In addition, universities should continue improving quality assurance systems, accreditation procedures, and professional training programs related to strategic management for academic leaders and university administrators.

Sustainable funding mechanisms for research, innovation, and technological modernization are equally important for the successful implementation of strategic plans. Governments and higher education institutions should also encourage international academic cooperation, interdisciplinary research partnerships, and academic mobility programs in order to strengthen global competitiveness. In this context, both Azerbaijan and Türkiye may benefit considerably from exchanging institutional experiences, developing joint educational initiatives, and supporting collaborative policy approaches in higher education governance and strategic management.

Conclusion. Strategic planning has become one of the essential components of contemporary higher education governance. The comparative analysis of Azerbaijan and Türkiye demonstrates that strategic planning contributes positively to institutional effectiveness by improving organizational coordination, governance efficiency, quality assurance practices, and academic competitiveness. In today's rapidly evolving educational environment, universities are expected not only to provide high-quality education but also to contribute actively to scientific innovation, digital transformation, and socio-economic development. For this reason, strategic management approaches increasingly function as important instruments for achieving institutional sustainability and supporting long-term development objectives.

Universities in Türkiye generally demonstrate more institutionalized strategic management systems due to their longer experience with administrative reforms and more established quality assurance mechanisms. Their broader experience in accreditation procedures, performance evaluation systems, and participatory governance models contributes to more systematic implementation of institutional strategies. Azerbaijani universities, although still developing institutionally in certain areas, have made considerable progress through modernization and internationalization reforms. In recent years, universities in Azerbaijan have strengthened digital governance systems, expanded international academic cooperation, and increased their participation in global educational and research initiatives.

The findings of the study indicate that successful strategic planning depends not only on the preparation of formal policy documents but also on effective implementation mechanisms, active stakeholder participation, institutional flexibility, and continuous monitoring and evaluation processes. Universities capable of integrating adaptive strategic management approaches are generally better prepared to respond to future educational, technological, and socio-economic challenges. Furthermore, institutional success largely depends on the ability of universities to combine strategic vision with innovation, transparency, and evidence-based decision-making practices.

Strengthening academic and institutional cooperation between Azerbaijan and Türkiye may also contribute significantly to the exchange of best practices and the development of more sustainable, competitive, and innovation-oriented university governance models in the future. In this context, strategic planning should be viewed not as a formal administrative procedure, but as a dynamic and continuous process that supports institutional development, organizational resilience, and long-term academic success.

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DOI https://doi.org/10.30525/2592-8813-2026-20

THE EDUCATIONAL POTENTIAL OF VIDEO RESOURCES IN DEVELOPING THE AUDITORY COMPETENCE OF HIGHER EDUCATION STUDENTS WHEN LEARNING A FOREIGN LANGUAGE

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Abstract. In this article, the authors examine the didactic potential of modern video resources in the process of developing the listening skills of higher education students when learning a foreign language. The relevance of the study stems from the need to modernise students' foreign language training in the context of the digitalisation of the educational environment and the necessity to develop skills for the effective perception of authentic foreign-language speech. The scientific novelty of the study lies in the justification of the organisational and pedagogical conditions for the effective use of video resources to develop global, detailed and critical listening skills among learners. It has been established that the integration of video materials into the foreign language learning process increases students' motivation, stimulates their cognitive activity, and contributes to the development of intercultural communication and the improvement of foreign language communicative competence.

Key words: listening competence, video resources, foreign language communicative competence, higher education students, digitalisation of education, authentic video content, listening comprehension, foreign language.

Introduction. The current stage of development in higher education is characterised by the rapid digitalisation of the educational environment and the introduction of innovative teaching technologies, which requires lecturers at higher education institutions to integrate a variety of approaches, formats, methods and digital tools into the process of training students. The issue of developing foreign-language listening competence is of particular relevance, as listening forms the basis of effective intercultural communication and ensures the development of the ability to perceive authentic foreign-language speech in real-life communication situations.

In the context of researching the didactic potential of video resources, the use of modern authentic video materials as an effective tool for developing the listening competence of higher education students whilst studying a foreign language is of particular importance. Video resources create conditions for combining auditory and visual channels of information perception, which contributes to a better understanding of speech content, the development of auditory attention, memory and skills in interpreting foreign-language contexts. The use of authentic video content in the educational process not only boosts learners' motivation to study a foreign language, but also provides immersion in a real-life language environment. Thanks to video materials, students have the opportunity to observe the natural speech of native speakers, the peculiarities of intonation, speech rate and non-verbal communication, as well as to familiarise themselves with the cultural, social and behavioural aspects of the foreign-language environment (Rohulska, 2024). This contributes not only to the development of language skills but also to intercultural competence, which is an important component of the professional training of modern specialists.

The didactic potential of video resources also lies in the possibility of implementing interactive and competence-based approaches to learning. The use of learning platforms, video clips, TED Talks, YouTube channels, educational podcasts and interactive video services allows for the organisation of multi-level tasks to develop listening skills, critical thinking, content prediction, information analysis and subsequent communicative interaction. When working with video materials, learners develop speaking, reading and writing skills, as listening is integrated with other types of language activity.

The purpose of the article is to provide a theoretical justification and analysis of the didactic potential of modern video resources in the process of developing the listening skills of higher education students whilst studying a foreign language, as well as to identify effective approaches, methods and digital tools for using authentic video content in the context of the digitalisation of the educational environment.

To achieve the stated aim of the study, the following research objectives have been identified:

1. To analyse scientific and pedagogical approaches to the development of listening competence among students at higher education institutions during the process of learning a foreign language.
2. To characterise the essence and structure of listening competence as a component of foreign language communicative competence.
3. To investigate the didactic potential of modern video resources in the context of the digitalisation of the educational process.

Research materials and methods. In the course of the research, we endeavoured to make the fullest possible use of the potential of comprehensive, competence-based and systematic scientific approaches. Taken together, these approaches enable a comprehensive analysis of the psychological and pedagogical literature, in particular the study of monographic scientific publications and dissertations that address the chosen topic. This enables us not only to gain a deeper understanding of the theoretical foundations, but also to clarify the distinctive features of scientific concepts and perspectives, and consequently to formulate more well-founded conclusions and recommendations aimed at the further development of practice-oriented issues.

Results and discussion. In contemporary academic and pedagogical discourse, the issue of developing the listening skills of higher education students occupies a significant place within the framework of foreign-language professional training. The active processes of globalisation, the digitalisation of the educational environment and Ukraine's integration into the European educational area necessitate the training of competitive specialists capable of effective intercultural communication in a foreign language. In this context, the development of receptive types of speech activity takes on particular significance, particularly listening, which serves as a fundamental component of foreign-language communicative competence.

Foreign-language speech activity is viewed as a purposeful process of exchanging information in a foreign language through the interaction of communication participants. Within the structure of foreign-language speech activity, scholars identify four interrelated types: listening, speaking, reading and writing. Listening, in this context, is not only a distinct type of communicative activity but also an important means of foreign language learning, facilitating the development of phonetic, lexical, grammatical and communicative skills.

Scientific and pedagogical approaches to the development of listening competence are based on the principles of the communicative, competence-based, activity-based, interactive and digital approaches. The communicative approach focuses the educational process on developing learners' ability to engage in real-life communication in a foreign language. Within this approach, listening is regarded as the foundation for perceiving and interpreting spoken information in an authentic environment. M. Canale and M. Swain made a significant contribution to the development of the communicative approach, defining communicative competence as a system of linguistic, sociolinguistic and strategic skills.

The competence-based approach focuses on the learner's ability to apply acquired knowledge and skills in practical situations of foreign language communication. In the context of listening, this involves developing the skills to perceive authentic speech, analyse the content of a message, identify key information and respond appropriately to what has been heard. In accordance with the Common European Framework of Reference for Languages (CEFR), listening is defined as one of the core components of language competence and involves the development of skills in understanding spoken language in various communicative situations. Listening and speaking are interrelated components of oral communication. This is evident in the constant alternation between the processes of perceiving and producing speech during communication. During listening, not only is information perceived, but the listener also internally prepares a verbal response to the message heard. This is precisely why the development of listening competence directly influences the formation of oral communication skills.

Scientific studies (Mamachych, 2023; Nezhyva, 2023) emphasise the close interconnection between listening and other types of speech activity. Listening and reading belong to the receptive types of speech activity, as they involve the perception, comprehension and interpretation of information. At the same time, writing and speaking are productive activities, which are also based on processes of internal speech. During listening, information is perceived through the auditory channel, and during reading – through the visual channel. However, reading is also accompanied by the internal vocalisation of the text, which indicates a psycholinguistic link between these processes. Recent research shows that the effective development of listening skills requires the use of authentic materials and digital technologies. Video resources, podcasts, TED Talks, YouTube channels and interactive platforms are becoming particularly popular, as they create the conditions for learners to immerse themselves in a real foreign-language environment. The use of authentic video content helps develop skills in perceiving different types of speech, intonation patterns, accents and the communicative behaviour of native speakers. The cognitive approach, which focuses on the development of mechanisms for perception, memory, attention and predicting speech content, plays an important role in the formation of listening competence. Researchers emphasise that the listening process involves several interrelated stages: perception of the sound signal, decoding of information, interpretation of content, and the formation of an appropriate response (Nezhyva, 2023).

In today's context, the digital approach to foreign language learning is of particular importance. The digitalisation of education creates new opportunities for the development of listening competence through the integration of multimedia resources, interactive platforms and adaptive educational technologies. The use of digital tools allows for the personalisation of learning, the adjustment of the pace at which information is presented, the use of subtitles, interactive exercises and automated monitoring of learning outcomes.

Research (Rohulska, 2024; Bihych, Borysko, et al., 2013) confirms the effectiveness of using multimedia technologies in the development of listening skills. In particular, R. Mayer, within the framework of multimedia learning theory, demonstrates that combining visual and auditory channels of perception facilitates better information retention and enhances the effectiveness of the learning process. In modern pedagogical practice, interactive methods for developing listening competence are widely used: problem-based learning, the case method, project work, discussions, role-plays and situational modelling. Such methods enable the cognitive activity of learners to be stimulated and skills in real-life foreign language communication to be developed.

Listening, as a type of speech activity, is characterised by a complex structure and a multi-level mechanism of implementation. In the process of auditory perception of foreign-language speech, the learner carries out several interrelated operations:

- recognition of sound signals;
- matching sound units with linguistic patterns;
- decoding lexical and grammatical content;

• interpreting information;
• forming an internal or external response to what has been heard.

It is important to note that listening competence has a multi-component structure. It is usually divided into linguistic, communicative, sociocultural, strategic and psychological components. The linguistic component encompasses knowledge of the phonetic, lexical and grammatical features of a foreign language. For successful listening, the learner must possess a sufficient vocabulary, understand grammatical structures and recognise the features of the language's sound system. It is phonetic competence that forms the basis for the adequate perception of foreign-language speech, as difficulties in recognising sounds, intonation or rhythm can significantly complicate the process of understanding information. The speech component involves the development of skills for the direct perception and interpretation of spoken language. It includes the ability to identify the topic of a message, extract the main idea, understand details, establish logical connections between parts of the text, and predict the further content of the utterance. The sociocultural component of listening competence is linked to an understanding of the cultural, social and behavioural characteristics of native speakers. Effective listening involves not only decoding the linguistic material, but also interpreting the speaker's communicative intentions in accordance with the cultural context. In this regard, knowledge of traditions, the norms of conversational etiquette, non-verbal communication and social behaviour patterns plays an important role. The strategic component involves the use of specific listening strategies that help to compensate for a lack of language proficiency or difficulties in comprehending information. Such strategies include predicting the content of a message, guessing the meaning of unfamiliar words from context, identifying key words, using non-verbal cues, and re-processing information. The psychological component relates to the development of auditory attention, memory, concentration, and motivation to comprehend foreign-language speech. The listening process requires a significant level of cognitive activity; therefore, the learner's psychological readiness to work with authentic speech is an important prerequisite for the successful development of listening competence.

A distinctive feature of listening competence is its close interconnection with other components of foreign language communicative competence. Listening and speaking form a single system of oral communication, as they function in interaction within the actual communication process. The perception of the interlocutor's speech forms the basis for the formation of one's own utterances, and successful speaking is impossible without well-developed listening skills.

The process of perceiving spoken foreign language speech by ear is a complex, multi-level psycholinguistic phenomenon that enables the fulfilment of a wide range of communicative tasks in the course of interpersonal and intercultural interaction. In modern foreign language teaching methodology, listening is regarded not only as a receptive form of speech activity, but also as an important mechanism for developing learners' communicative competence in a foreign language. It is through listening that the phonetic, lexical, grammatical and intonational features of a language are acquired, and skills in interpreting the content of a message, predicting information and producing an appropriate linguistic response are developed.

In scientific and pedagogical research, the listening process is classified according to communicative purpose and the level of information processing. The most common approach is to distinguish three main types of listening: *global, detailed and critical.* Despite the arbitrary nature of this division – since in the actual process of communication these types interact and function in an integrated manner – this classification has significant didactic value. It enables the setting of learning objectives, the selection of appropriate methods, forms and exercises, and ensures the systematic development of listening competence among students in higher education institutions. Each type of listening is designed to develop specific listening skills and cognitive strategies for comprehending speech in a foreign language. The combined development of these skills enables individuals to function effectively in real-life foreign-language communication situations, to comprehend information accurately,

and to interpret the content of messages of varying levels of complexity. Global listening, which is also referred to in methodological literature as introductory or general listening, is primarily aimed at developing the ability to grasp the main content of an audio text without a detailed analysis of individual linguistic units. The main objective of this type of listening is to develop the ability to identify the topic of a message, understand the main idea, and establish the general content and logical structure of the information presented. During global listening, the learner does not focus on every unfamiliar word or grammatical construction, but concentrates on the overall meaning of the text. A distinctive feature of global listening is the activation of mechanisms for predicting and anticipating the content of the message. Learners practise predicting the topic of an audio text based on the title, visual cues, keywords or contextual information. This approach helps to develop cognitive flexibility and foster compensatory strategies, which is particularly important when working with authentic foreign-language material. To develop global listening skills, modern foreign language teaching methods actively employ a variety of interactive exercises. These include answering general questions about the content of the audio text, identifying the main idea of the message, selecting headings for individual sections of the text, establishing the chronological sequence of events, and creating mind maps, diagrams or graphical models of the content of the material listened to. Such tasks help to stimulate analytical thinking, develop concentration and foster a holistic understanding of foreign-language speech. Another important type of listening is detailed listening, which involves a thorough and complete understanding of the content of the message being heard. The main aim of this type of listening is to enable learners to extract specific information from the spoken text, focusing on details, facts, arguments, statistics, dates, proper nouns or specialist terminology. Detailed listening is of particular importance in professionally oriented foreign language learning, where an accurate understanding of specialised information is essential. Unlike global listening, detailed listening requires a higher level of concentration and cognitive activity. Learners not only receive information but also analyse, interpret and organise it. This process often requires listening to the audio material several times, gradually clarifying the content and focusing on specific details that may have been overlooked during the first listening. Working with authentic video and audio materials, which contain natural speech by native speakers, idiomatic expressions, elements of slang, professional vocabulary and culturally specific units, plays a special role in the development of detailed listening. Working with such materials helps to develop the ability to adapt to different types of speech, speech rates and intonation patterns.

An important component of modern listening competence is critical listening, which focuses on developing the skills to critically interpret and evaluate the information heard. Through critical listening, learners learn not only to grasp the content of a message, but also to analyse the reliability of the information, identify the author's position, evaluate the arguments and formulate their own views on what they have heard. Critical listening is directly linked to the development of critical thinking, which is regarded in modern education as one of the key competences of the 21st century. When working with audio materials, learners learn to relate new information to their own experience, analyse different points of view, identify manipulative elements and defend their own position with sound reasoning. Critical listening is particularly relevant in the context of the digitalisation of the educational landscape and the rapid proliferation of information resources, as learners must be able to critically evaluate information flows, work with media content and make informed choices about the information they consume.

To summarise, global, detailed and critical listening are complementary components of the process of developing listening competence among students in higher education. Each of these types of listening fulfils a distinct didactic function and facilitates the development of specific linguistic, cognitive and communicative skills. The comprehensive use of different types of listening in the process of foreign language learning contributes to the development of the ability to effectively perceive, analyse and interpret foreign-language speech in real communicative interaction.

The appropriateness of using video materials in the process of teaching a foreign language to students of higher education institutions is determined by current trends in the digitalisation of the educational environment, the development of multimedia technologies and the need to improve the foreign-language communication skills of future specialists. In modern foreign language teaching methodology, video resources are regarded as an effective didactic tool that integrates auditory, visual and emotional channels of information perception, thereby contributing to the enhancement of the educational process and the development of students' listening competence.

Research in the fields of education and pedagogy shows that the use of authentic video materials has a positive impact on students' motivation, stimulates their cognitive activity, improves their concentration, and helps them to retain the learning material more effectively. Video content provides an immersive experience in a foreign-language communicative environment, creating conditions for the perception of foreign-language speech that is as close as possible to real-life linguistic experience. This is precisely why the use of video resources in the process of learning a foreign language is one of the most effective means of developing the listening competence of higher education students.

Video materials are of particular value in the context of developing intercultural communicative competence. Authentic video content familiarises students with the sociocultural characteristics of the country whose language is being studied, demonstrating the specific features of native speakers' speech behaviour, their customs, traditions, etiquette norms, and everyday and professional communicative situations. Video materials allow for the illustration of culturally marked phenomena, concepts and social models of behaviour, which are often impossible to fully explain using text-based sources alone. An important advantage of using video resources is their comprehensive impact on the development of various types of language activity. Thanks to the combination of audio and visual elements, learners not only improve their listening skills but also develop their speaking, reading and writing abilities. Furthermore, video materials create favourable conditions for the development of phonemic awareness, intonation sensitivity and students' pronunciation skills. Observing speakers' articulation, intonation patterns, rhythm and speech rate enables learners to acquire the phonetic features of a foreign language more effectively and develop natural foreign-language communication skills.

In modern educational practice, it is advisable to use a wide range of video materials that vary in subject matter, speech style, level of difficulty and communicative focus. Among the most effective types of video content are news reports, talk shows, interviews, excerpts from television programmes, clips from feature films and series, documentaries, adverts, vlogs, educational videos, TED Talks, podcasts and music videos. The use of various types of video material allows for the diversification of the educational process, helps maintain students' motivation to learn, and ensures the development of various listening strategies.

At the same time, the effectiveness of using video materials depends to a large extent on compliance with certain pedagogical and organisational-methodological requirements. First and foremost, video content must be appropriate to the students' age, language proficiency, professional needs and life experience. Video materials that are excessively complex or overloaded with information can reduce learners' motivation and complicate the process of comprehending foreign-language speech. An important prerequisite is the teacher's prior methodological preparation for using video resources. The teacher must independently analyse the content of the video material, identify potential linguistic difficulties, anticipate possible comprehension issues, and develop a system of exercises and tasks aimed at developing listening skills. Tasks accompanying the video material should not only facilitate the process of understanding the information, but also stimulate students' cognitive activity, foster critical thinking and encourage communication in a foreign language. The organisation of video viewing must also meet certain methodological requirements. In particular, it is necessary to ensure appropriate technical conditions for comfortable viewing of video content: high-quality images, clear sound, adequate lighting in the classroom, and the ability for all participants in the educational pro-

cess to view the material simultaneously. The speakers' pronunciation in the video material must be clear, and the content itself must be relevant to the subject matter and objectives of the curriculum. Particular attention should be paid to the length of the video material. Researchers and educational experts emphasise that short video clips lasting between 30 seconds and 10 minutes are most effective for use in lessons. It is believed that even 4–5 minutes of intensive viewing can ensure productive work by a student group throughout the entire lesson. This is explained by the high information density of video content and the significant cognitive load involved in perceiving authentic foreign-language speech.

From the above, we conclude that the use of video materials in the process of foreign language teaching in higher education institutions has significant didactic potential and serves as an effective means of developing learners' listening competence. The comprehensive impact of video resources on the motivational, cognitive and communicative spheres enhances the effectiveness of foreign language training, promotes the development of intercultural competence and creates conditions for the formation of the ability to engage in real foreign language communication within a digital educational environment.

Conclusion. In this study, the authors analyse the educational potential of modern video resources in developing the listening skills of higher education students when learning a foreign language. It has been established that, in the context of the digitalisation of the educational environment and the transformation of modern higher education, the use of authentic video content is one of the most effective means of developing students' foreign-language communicative competence, as it ensures the integration of auditory, visual and cognitive channels of information perception. The study revealed that auditory competence is a complex integrative construct encompassing linguistic, speech-related, sociocultural, strategic and psychological components. It is an important component of foreign language communicative competence and ensures learners' ability to adequately perceive, understand, analyse and interpret foreign language speech in real-life intercultural communication situations. Particular attention in the study was paid to the analysis of different types of listening – global, detailed and critical. It has been established that the integrated use of these types of listening in the process of working with video resources facilitates the development of various listening strategies: predicting content, identifying key information, analysing details, critical reflection, and forming one's own position regarding the information received. This contributes to the development of critical thinking, intercultural competence and communicative autonomy among learners.

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DOI https://doi.org/10.30525/2592-8813-2026-2-21

BORROWINGS AND CULTURAL EXCHANGE BETWEEN ENGLISH AND GERMAN THROUGHOUT HISTORY

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Abstract. The article examines the historical dynamics of lexical and cultural exchange between English and German, two closely related West Germanic languages whose contact spans more than fifteen centuries. The study applies a diachronic analytical framework to trace five major phases of borrowing: the common Proto-Germanic heritage; the early medieval period of parallel West Germanic development; the Early Modern era of scholarly and religious contact; the 18th-to-20th-century influx of German loanwords into English in science, philosophy, and military discourse; and the contemporary dominance of English-origin Anglicisms in modern German. The results demonstrate that borrowing between these languages has never been unidirectional – it reflects recurring episodes of cultural prestige exchange, political contact, and technological transfer. The study concludes that English-German lexical exchange constitutes a mirror of broader European cultural history and carries significant implications for historical linguistics, cultural studies, and foreign language pedagogy.

Key words: lexical borrowings, language contact, Anglicisms, Germanisms, diachronic linguistics, cultural exchange, West Germanic languages, loanwords.

Introduction. The relationship between the English and German languages is one of the most historically significant and linguistically complex bilateral contact situations in the recorded history of European languages. Both languages descend from the West Germanic branch of the Proto-Germanic language family, sharing a common ancestor spoken in northern and central Europe approximately 2,500 years ago (Baugh & Cable, 2013: 12). This genealogical kinship means that the interaction between them is not simply a story of borrowing between two foreign languages, but a story of gradual divergence, periodic re-contact, and reciprocal cultural enrichment across a timeline that extends from the earliest attested Anglo-Saxon manuscripts of the 7th century to the globalised digital communication landscape of the 21st century.

The scholarly attention paid to this relationship has been markedly asymmetrical. A substantial body of research has examined the impact of English on German – the phenomenon of Anglicisms – driven by concerns over the perceived cultural and linguistic dominance of English in the post-1945 global order. Studies by Onysko (2007), Fiedler (2017), and others have documented in detail the mechanisms by which English words, phrases, and discourse patterns have entered German across every domain of social life, from business and technology to popular culture and youth slang. By contrast, the reverse phenomenon – the influence of German on English – has received comparatively little systematic attention. As Schultz (2016) notes, "while there are plenty of studies on the impact English

has exerted on the German language, the reverse contact situation has been relatively neglected" (Schultz, 2016: 14).

This contradiction in the literature reflects a broader cultural assumption about the directionality of linguistic prestige in the contemporary world. Yet a diachronic perspective reveals that this assumption is historically contingent and relatively recent. For much of the 18th and 19th centuries, German, not English, was the dominant language of science, philosophy, music, and scholarship in the European intellectual world, and the English lexicon was significantly enriched by borrowings from German during this period. Words such as kindergarten, wanderlust, angst, gestalt, weltanschauung, leitmotif, and rucksack entered English as markers of German cultural prestige. The vocabulary of chemistry, geology, mineralogy, and psychology in English retains to this day a substantial stratum of German origin: quartz, cobalt, zinc, bismuth, nickel, protein, and many more.

The purpose of the article is to provide a comprehensive, chronologically organised analysis of the bidirectional lexical and cultural exchange between English and German from their shared Proto-Germanic roots to the contemporary phenomenon of globalised English's influence on standard German. It draws on the theoretical frameworks of contact linguistics, cultural borrowing theory, and diachronic lexicology, and synthesises findings from key studies in the field, including the corpus-based research of Schultz (2016, 2017), the diachronic analysis of Trutsunenko and Vesolovskyi (2025), and the foundational historical linguistics scholarship of Baugh and Cable (2013) and Thomason and Kaufman (1988). The study is motivated by the conviction that understanding the full bilateral history of English-German lexical exchange is essential for historical linguists, cultural historians, and language educators alike.

Materials and Methods. The methodology of the present study is grounded in diachronic and comparative linguistics. The primary analytical approach is the historical-comparative method, which involves the systematic comparison of lexical forms, semantic fields, and phonological adaptations across different historical periods of English and German, with reference to their common Proto-Germanic ancestor. This approach is supplemented by the sociolinguistic analysis of the extralinguistic conditions – political, economic, cultural, and technological – that generated each major phase of interlingual contact and transfer.

The empirical basis of the study draws on several complementary sources. First, the lexicographic corpus established by Schultz (2016) from the Oxford English Dictionary Online, comprising 1,958 20th-century German borrowings in English, provides the primary quantitative foundation for the analysis of the most recent and systematically documented phase of German influence on English. Second, the diachronic survey by Trutsunenko and Vesolovskyi (2025) of lexical borrowings across the history of the German language – covering Latin, Greek, French, Italian, Dutch, and English strata – serves as a complementary framework for understanding the German side of the bilateral exchange. Third, the standard historical reference works on the English language, particularly Baugh and Cable's (2013) The History of the English Language and Pfeffer and Cannon's (1994) German Loanwords in English: An Historical Dictionary, provide the etymological data for the pre-20th-century phases of the analysis.

The study employs the typology of borrowings established by Thomason and Kaufman (1988), which distinguishes between loanwords (direct phonological and morphological adoption of the source form), loan translations or calques (structural replication of the source form using native material), semantic loans (adoption of a new meaning for an existing word under the influence of a foreign equivalent), and partial loan translations (hybrid forms combining native and borrowed elements). This typology is applied to the analysis of examples across all historical periods examined, allowing for a differentiated picture of the depth and nature of contact at each stage.

The sociolinguistic dimension of the analysis draws on the framework of Trudgill (2004) and Crystal (2012), which situates individual language contact phenomena within the broader context of

macro-social factors: the demographic weight of speaker communities, the prestige relations between languages, the domains of social life in which contact occurs, and the institutional and normative constraints on language use. The integration of these macro-social factors into the analysis allows the study to move beyond a purely lexicographic inventory of borrowings towards an explanation of why each phase of English-German exchange took the form it did.

Results and Discussion. Any account of the relationship between English and German must begin not with borrowing but with the prior unity from which both languages diverged. English and German, together with Dutch, Frisian, and the Scandinavian languages, descend from Proto-Germanic, the reconstructed common ancestor spoken in Scandinavia and northern Germany around the first millennium BCE (Schrijver, 2014: 3). This shared ancestry means that a substantial proportion of the core vocabulary of both languages – covering kinship terms, body parts, numbers, basic verbs of motion and perception, and agricultural and domestic terminology – is not the result of borrowing but of retention from a common source (Baugh & Cable, 2013).

The phonological correspondences between English and German provide the most transparent evidence of this heritage. Jacob Grimm's systematic mapping of the consonant shifts that differentiate Germanic languages from other Indo-European branches, and the subsequent High German Sound Shift (circa 500–700 CE) that further distinguished High German from Old English, produced the regular correspondences visible in every modern speaker's intuition: English *make* corresponds to German *machen*, *water* to *Wasser*, *night* to *Nacht*, *book* to *Buch* (Schrijver, 2014). These correspondences are not coincidental resemblances but the predictable outcomes of sound laws operating on a common source, and any serious analysis of English-German contact must keep this common heritage analytically distinct from the borrowing that came later (Thomason & Kaufman, 1988). The concept of false friends (Scheinfremde) in English-German lexicography (words that look similar but have diverged in meaning, such as English *gift* (a present) versus German *Gift* (poison)) illustrates the interpretive pitfalls that arise when the common heritage is not properly accounted for (Pfeffer & Cannon, 1994).

This shared foundation also carries deep cultural significance. The Angles, Saxons, and Jutes who migrated to Britain from present-day northern Germany and Denmark in the 5th and 6th centuries CE carried with them not only their dialects but their entire cultural world: kinship structures, warrior ethics, pagan religious beliefs encoded in the day-names (*Tuesday* from *Tyr*, *Wednesday* from *Woden*, *Thursday* from *Thor*, *Friday* from *Frigg*), and a shared heroic literary tradition (Baugh & Cable, 2013).

The Old English epic Beowulf, the oldest substantial work of English literature, is set in Scandinavia and features heroes whose names and attributes parallel those of Old High German heroic poetry, testimony to the cultural unity that preceded linguistic divergence. As Schrijver (2014) emphasises, this cultural substrate constitutes the deep foundation on which all subsequent English-German contact and exchange was built, and its traces persist in the core vocabulary of both modern languages in ways that continue to shape the experience of each as "familiar yet foreign" to speakers of the other (Schrijver, 2014: 15).

Following the Anglo-Saxon migration, Old English (c. 450–1100) and the Old High German dialects (c. 750–1050) developed in relative geographic separation, each responding to the distinctive pressures of its own social and political environment. Old English underwent intensive contact with Latin through the Christianisation of the Anglo-Saxons beginning in 597 CE, and with Old Norse through the Viking settlements of the 9th and 10th centuries; Old High German evolved under the influence of Latin through the Carolingian court and monastic culture, and through contact with Slavic and Romance languages (Trudgill, 2004).

This period of parallel development is characterised by limited direct contact and therefore relatively little direct borrowing between Old English and Old High German. The simultaneous Latinisation of both languages, however, created a substantial shared stratum of ecclesiastical vocabulary: *church*

(Old English cirice from Greek kyriake), *bishop* (Old English biscop from Latin episcopus), *monk* (Old English munuc from Latin monachus) entered both languages through largely independent channels of transmission (Baugh & Cable, 2013). This Latinisation must be carefully distinguished from direct interlingual contact, a methodological point that Thomason and Kaufman (1988) identify as essential for the accurate attribution of borrowings in situations of multilateral contact. Crucially, as Trutsunenko and Vesolovskyi (2025) demonstrate in their diachronic survey of German lexical development, this early Latin stratum established a template of openness to prestigious foreign vocabulary that would characterise German lexical behaviour through every subsequent phase of its history.

The High German Consonant Shift, affecting German but not English, created the most immediately visible phonological differences between the languages, yet as Schrijver (2014) observes, the structural proximity that remained meant that phonological adaptation of borrowings between the two was always relatively straightforward, a factor that facilitated lexical transfer across every subsequent period of contact (Thomason & Kaufman, 1988).

The Protestant Reformation of the 16th century opened the next major phase of intensified English-German contact, one with profound consequences for both languages. Luther's translation of the Bible into German (New Testament 1522, complete Bible 1534) standardised the High German dialect and elevated it to a literary and religious language of enormous prestige (Baugh & Cable, 2013). Both the Lutheran Bible and the King James Bible (1611) not only standardised their respective languages but created large bodies of shared religious vocabulary drawn from the same Hebrew and Greek sources, reinforcing parallel Latinate-Christian vocabulary strata.

The Reformation created direct channels of intellectual exchange: Protestant scholars, clergy, and refugees moved between England and the German states throughout the 16th and 17th centuries (Pfeffer & Cannon, 1994). The influence of German Protestant theology on English religious thought (visible in the career of William Tyndale, whose English Bible translation was shaped by Luther's) contributed to a shared religious vocabulary in which German-origin concepts entered English through Latin intermediary or through direct contact with German-speaking communities in England. German universities such as Heidelberg, Leipzig, Tübingen, Wittenberg, meanwhile became centres of humanist scholarship (Baugh & Cable, 2013), establishing the first systematic institutional channel for German loanwords into English intellectual discourse, a channel that would widen dramatically in the following two centuries.

The period from approximately 1750 to 1914 represents the most intensive phase of German influence on the English lexicon, driven by the extraordinary intellectual and scientific prestige of the German-speaking world during this era. German was the dominant language of European science and scholarship: the great majority of foundational research in chemistry, physics, biology, geology, medicine, psychology, philosophy, music theory, and literary criticism was published in German, and English-speaking scholars wishing to participate in these fields were effectively required to acquire reading knowledge of German (Schultz, 2016).

This structural condition of German intellectual dominance created powerful pressure for the adoption of German terminology into English across a wide range of domains, a pattern that Trudgill (2004) identifies as characteristic of contact situations in which one language community perceives the other as a source of prestige knowledge and cultural capital. The discipline of chemistry owes a particularly large debt to German lexis during this period: the element names *zinc* (German *Zink*), *cobalt* (from German *Kobold*, a goblin), *bismuth* (from *Wismuth*), *nickel* (from *Nickel*, a mischievous sprite), and *tungsten* (from Swedish-German *Wolfram*) entered English through the work of German-speaking chemists (Pfeffer & Cannon, 1994). The word *quartz* is of German origin (*Quarz*, first attested in the 16th century), and the terminology of crystallography, spectroscopy, and electrochemistry in English retains substantial German strata from this period (Pfeffer & Cannon, 1994).

The vocabulary of anatomy, pharmacology, and psychiatry – including psychosis, neurosis, and the conceptual framework of Freudian psychoanalysis – was developed primarily in German before being adopted into English (Schultz, 2016). The word *kindergarten*, coined by Friedrich Fröbel in 1837, was adopted into English in the latter half of the 19th century, first in the United States, where German immigrant communities had established kindergartens as early as the 1850s (Baugh & Cable, 2013).

Philosophy is perhaps the domain in which German borrowings into English are most intellectually consequential. Terms such as *Weltanschauung* (worldview), *Zeitgeist* (spirit of the age), *Schadenfreude* (pleasure in another's misfortune), Angst (dread or anxiety), *Gestalt* (form, configuration), and *Übermensch* (overman, associated with Nietzsche) entered English not simply as loanwords but as conceptual imports carrying entire philosophical frameworks (Schultz, 2017). As Pfeffer and Cannon (1994) note, translators often found retaining the German form more intellectually honest than risking conceptual distortion through an inadequate English equivalent – a form of what Thomason and Kaufman (1988) term "prestige borrowing", in which the foreign form itself carries epistemic authority. The vocabulary of Western classical music was similarly dominated by German terminology throughout this period: *Leitmotif* (associated with Wagner), *Lied* (German art song), *Singspiel, Kapellmeister*, and *Gesamtkunstwerk* entered English as markers of the cultural hegemony of German music from Bach through Wagner (Schultz, 2016).

The military vocabulary of English acquired significant German influence through the two World Wars. *Blitzkrieg* (lightning war) entered English in 1939 and gave rise to the abbreviated blitz; *Flak* (from Fliegerabwehrkanone) acquired the broader metaphorical meaning of severe criticism; to *strafe* (from German strafen, to punish) entered English during the First World War; *U-boat* (Unterseeboot), Wehrmacht, Panzer, and Luftwaffe all entered English through conditions of military conflict (Pfeffer & Cannon, 1994). As Schultz (2016) observes, the vocabulary of the two World Wars accounts for a significant proportion of German loanwords that remain in active use in contemporary English, and their semantic integration has been particularly complete: *blitz, flak*, and *strafe* have all developed extended metaphorical senses that no longer require any awareness of their German origin (Schultz, 2017).

The most systematically documented phase of German influence on English is the 20th century as a whole, which forms the subject of Schultz's (2016) monograph and her related article in English Today (2017). Drawing on a corpus of 1,958 German borrowings retrieved from the Oxford English Dictionary Online, Schultz (2016) demonstrates that the German influence on English in the 20th century was far more extensive than commonly recognised. Schultz (2017) identifies major thematic clusters: the natural sciences account for the largest group, including terms from physics (*bremsstrahlung*, *eigenvalue from Eigenwert*) and geology; the arts and humanities contribute *Bildungsroman, Weltliteratur, and Gesamtkunstwerk*; food and drink have yielded *bratwurst, sauerkraut, schnapps*, *Riesling, and delicatessen*; and the political vocabulary reflects turbulent history: *Nazi, Anschluss, Kristallnacht*.

Particularly notable is Schultz's (2016) finding that the semantic integration of German borrowings into English is, in the majority of cases, complete: borrowings have been absorbed into English word formation processes, generating productive derivatives and collocations. Kindergarten has spawned kindergartener and kindergarten teacher; Gestalt psychology gave rise to gestalt therapy and gestalt switch; rucksack generated the calque backpack while remaining in active British English use (Schultz, 2016). Schultz's (2016) further finding that German borrowings were most intensive in the first half of the 20th century, declining sharply after 1945, reflects the geopolitical reversal: the rise of English-language global dominance after 1945 fundamentally reversed the prestige relation between the two languages.

The post-1945 dominance of English as the global language of science, business, popular culture, and digital communication has produced what is arguably the most intensive phase of lexical borrowing

in the entire history of the English-German relationship but now flowing overwhelmingly from English into German. The phenomenon of Anglicisms in German has been extensively documented by Onysko (2007), Fiedler (2017), and Trutsunenko and Vesolovskyi (2025), all of whom situate contemporary English borrowings within the longer diachronic history of German lexical enrichment from external sources.

As Trutsunenko and Vesolovskyi (2025) demonstrate, German has absorbed successive waves of loanwords from Latin, Greek, French, Italian, and Dutch across its history; the contemporary English influx is thus the latest episode in a long tradition of German lexical openness to culturally dominant languages. Onysko (2007) documents this breadth across business and technology (*Meeting, Workshop, Feedback, Management, Marketing*), digital communication (*online, downloaden, uploaden, chatten, googeln*), and informal everyday speech (*cool, chillen, checken, sorry*), identifying a steady rise in Anglicism density in German print media from the 1950s to the early 2000s.

Fiedler (2017) draws attention to the particularly consequential phenomenon of phraseological borrowing – the adoption not merely of individual words but of prefabricated phrases, discourse formulae, and interactional routines. The English-origin phrase "*to make a difference*" has generated the German calque "*einen Unterschied machen*"; the greeting formula "*Have a nice day*!" and its German counterpart "*Einen schönen Tag noch*!" represent the adoption of an entire speech act convention (Fiedler, 2017). These phraseological imports carry cultural implications beyond their lexical content: they transfer norms of interaction and associations of modernity inseparable from English-language communication culture.

The grammatical integration of English borrowings into German follows systematic patterns documented by Onysko (2007): English verbs acquire German infinitive endings and inflect according to the weak verb paradigm (*googeln, downloaden, liken, posten*); English nouns are assigned grammatical gender, though with considerable variation that remains a source of prescriptive dispute (*das Blog, die App, der Stream, das Update*).

The response of German linguistic institutions to this influx reflects a tension between prescriptive anxiety and descriptive recognition of the naturalness of lexical borrowing as a mechanism of language change (Crystal, 2012). Crystal (2012) places this resistance in comparative perspective, noting that anxiety about English loanwords is a recurrent feature of the metalinguistic discourse of many European languages, reflecting a concern about cultural sovereignty that exceeds any strictly linguistic justification.

Historical precedent supports Crystal's (2012) scepticism about the effectiveness of puristic intervention: the German Sprachreinigung movement sought to replace foreign loanwords with native coinages, and while some calques succeeded spectacularly – *Fernsprecher* for telephone, *Fernseher* for television, *Flugzeug* for aeroplane, *Briefmarke* for postage stamp – others failed to displace the foreign form (Trudgill, 2004). These calques themselves, as Thomason and Kaufman (1988) note, constitute loan translations in which the structural model of the foreign word is replicated using native material, demonstrating that even puristic responses to lexical contact involve a form of structural cultural exchange (Thomason and Kaufman, 1988).

Taken together, the findings of the diachronic survey invite several theoretical observations that extend beyond purely lexicographic documentation. The most important is the confirmed bidirectionality of the English-German language contact relationship over historical time. The contemporary assumption, reinforced by the dominance of Anglicism studies (Onysko, 2007; Fiedler, 2017), that English is the donor language and German the recipient is shown to be historically contingent and relatively recent. For approximately two centuries before 1945, the prestige relation was arguably reversed, with German the dominant language of intellectual life and English the absorbing party (Schultz, 2016; Pfeffer & Cannon, 1994). As Trudgill (2004) emphasises, the direction of borrowing is determined not by intrinsic linguistic properties but by social, political, and cultural

factors subject to historical change – a conclusion the English-German case illustrates with unusual clarity. A further observation concerns the relationship between lexical borrowing and cultural exchange. Loanwords do not simply carry lexical information across language boundaries; they carry cultural frameworks, conceptual systems, and social meanings (Thomason & Kaufman, 1988). The English adoption of Weltanschauung imports a German philosophical tradition; the adoption of Angst carries the existentialist connotations of the Kierkegaard-Heidegger tradition; the adoption of "*cool*" into German imports associations of African-American jazz culture and Californian youth culture inseparable from the word's pragmatic meaning (Fiedler, 2017; Onysko, 2007). As Crystal (2012) observes, the study of loanwords is necessarily also the study of cultural history, and the English-German case provides one of the most richly documented illustrations of this principle available in the history of any language pair.

Conclusion. The present study has traced the history of lexical and cultural exchange between English and German across five major phases, from the shared Proto-Germanic heritage through the contemporary dominance of English-origin Anglicisms in modern German. The findings demonstrate several overarching conclusions that have implications for historical linguistics, cultural studies, and language pedagogy.

First, the relationship between English and German is one of the most historically consequential bilateral language contact situations in European history. The two languages have been in continuous, if varying, contact for fifteen centuries, and the lexical traces of this contact are woven into the core vocabulary of both modern languages at every level of register and domain.

Second, the direction and intensity of borrowing has fluctuated historically in response to changing cultural prestige relations. The 18th and 19th centuries saw a massive transfer of German vocabulary into English in the domains of science, philosophy, music, and culture, reflecting German intellectual and cultural hegemony in the European world. The post-1945 period has seen an equally massive transfer of English vocabulary into German, reflecting the global dominance of English-language culture in the era of Americanisation and globalisation.

Third, lexical borrowing between English and German has never been purely linguistic; it has always been simultaneously cultural. Loanwords carry with them the cultural frameworks, conceptual systems, and social associations of their source communities. The study of English-German borrowings is therefore at the same time a study of the intellectual, cultural, and political history of Europe.

Fourth, the response of language communities to external lexical influence has varied historically between adoption, adaptation, calquing, and puristic rejection, and all four strategies are attested in the English-German contact situation. Understanding which strategy is employed under which social conditions is one of the most productive areas for further research in contact linguistics applied to this language pair.

The study contributes to the advancement of the scholarly understanding of English-German language contact by providing a comprehensive diachronic overview that integrates the rich contemporary literature on Anglicisms in German with the comparatively neglected literature on German borrowings in English. Future research should focus on the corpus-based analysis of German loanwords in current English usage, the sociolinguistic investigation of attitudes to Anglicisms in different German-speaking communities, and the pedagogical implications of English-German lexical history for language teaching in both English and German as foreign languages.

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DOI https://doi.org/10.30525/2592-8813-2026-2-22

THE EMERGENCE AND DEVELOPMENT OF PRIMARY EDUCATION PEDAGOGY

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Abstract. The article examines in detail the emergence and development of primary education pedagogy within a historical-pedagogical context. It is noted that at the initial stage primary education pedagogy was formed within philosophical thought and was based on general ideas related to the upbringing and development of the child. From the 17th century pedagogy took shape as an independent science and primary education pedagogy began a systematic path of development as a separate scientific direction. The article explores the development of this field in stages from ancient times to the modern period. While in ancient and medieval times education mainly had a philosophical and religious character, in the Renaissance and the modern era under the influence of humanistic ideas the natural development of the child and individual characteristics came to the forefront. During the period of classical pedagogy the scientific foundations of instruction and upbringing were further strengthened. In particular the ideas of prominent educators such as John Amos Comenius, John Locke, Jean-Jacques Rousseau, Johann Heinrich Pestalozzi and Konstantin Dmitrievich Ushinsky played an important role in the formation of the theoretical and methodological foundations of primary education. In the 20th century as a result of the activities of John Dewey, Maria Montessori and other scholars student-centered developmental and practice-oriented instructional approaches became widespread. The study also broadly highlights the historical stages of development in the preparation of primary school teachers. It is shown that although in the initial periods the teaching profession did not require special preparation later with the establishment of pedagogical courses seminaries and higher educational institutions this field became professionalized. In Azerbaijan the important role of the Gori Teachers Seminary as well as short-term pedagogical courses organized during the period of the Azerbaijan Democratic Republic in the formation of teacher training is emphasized. These courses made a significant contribution to eliminating the shortage of teachers and to the development of the national education system.

In conclusion it is emphasized that primary education pedagogy has passed a long path of historical development and has transformed from philosophical ideas into an independent pedagogical field based on scientific foundations and constantly improving. In the modern period this field forms the basis of a humanistic and development-oriented education model that ensures the comprehensive development of the student.

Key words: Primary education, pedagogy, upbringing, instruction, methodology, development, history of education, student-centered approach, didactics, education system.

Introduction. Primary education pedagogy, as one of the important and fundamental branches of pedagogical science, is closely connected with the socio-cultural development of society. This field encompasses the initial stage of a child's personality formation and studies the scientific foundations of the processes of their teaching, upbringing, and development. From a historical perspective, the formation of primary education pedagogy has undergone a long path of development: at the initial stage, it existed within general philosophical and pedagogical ideas, and in subsequent periods it evolved into an independent scientific discipline.

Beginning in the 17th century, the development of pedagogy as a distinct field of science laid the foundation for the systematic study of primary education. From this period onward, issues of teaching and upbringing in accordance with the age characteristics of the child became the subject of specialized scientific research.

In the course of historical development, such classical educators as Jan Amos Comenius, John Locke, Jean-Jacques Rousseau, Johann Heinrich Pestalozzi, Anton Makarenko (Makarenko, 1988, p.320), as well as representatives of the 20th century – John Dewey and Maria Montessori (Dewey 2008, p.384, Maria Montessori, 2011, p. 7-20) – made significant contributions to the formation of the scientific-theoretical and methodological foundations of primary education pedagogy.

In Azerbaijan, the development of primary education pedagogy is also based on rich historical traditions. A special role in this process was played by the Gori Teachers' Seminary, pedagogical courses, and in later periods, the activities of higher pedagogical educational institutions, all of which contributed to the advancement of this field. In the modern period, primary education pedagogy is developing on the basis of the competency-based approach, the model of learner-centered education, and the implementation of innovative technologies, thereby acquiring a more dynamic character. In this context, the study of the historical development of primary education pedagogy is of particular importance for understanding its contemporary scientific and theoretical foundations.

Analysis of Recent Research and Publications. During the years of independence, A. Mehrabov (Mehrabov, 2007, p. 112), A. Abbasov (Abbasov, 2015, 360 p. 3), F. Rustamov (Rustamov, 2010, 462 p.), R. Huseynzade (Huseynzade, 2012, 480 p.), and others developed and published textbooks and teaching manuals on pedagogy. All these publications are rich in scientific and methodological materials that contribute to the development of primary education. In the modern period, the quality of the education system directly depends on the level of teacher training. Primary school teachers, in particular, play a key role in shaping students' initial knowledge, skills, and values (Ismailova, 2013, 164 p.). Primary education is considered one of the crucial stages in the development of society, and the professionalism of teachers working at this level directly affects the overall quality of education. In this regard, the training of primary school teachers has historically been a central focus and has gone through various stages of development. In the early stages, such training was mainly carried out within the system of secondary specialized education, while in later periods it was elevated to the level of higher education.

In recent years, a number of scientific studies have been conducted in Azerbaijan focusing on the theoretical and methodological foundations of primary education pedagogy, its development trends, and its role in the modern educational system. In particular, the research carried out at the Department of Primary Education Pedagogy of the Azerbaijan State Pedagogical University plays an important role in the development of this field. The department continues its research activities in the areas of primary education didactics, national and moral education, and the study of the history of pedagogical thought (Rustamov, 2010, 462 p.).

In the textbook "Primary Education Pedagogy" by A. Abdullayev and N. Abdinova, the stages of the formation of primary education pedagogy, the characteristics of the development of pedagogical thought, and modern teaching methods are systematically analyzed. The authors consider primary education pedagogy as an independent scientific field, defining its aims, objectives, and research methods (Abdullaev, 2016, 338 p, Abdinova, 2017, 74 p.).

In the research of N. Abdinova, priority is given to issues of optimizing instruction in primary school and the development of the student's personality. The researcher notes that the use of modern educational technologies has a positive impact on increasing students' cognitive activity (Abdinova, 2017, 74 p.).

In recent years, scientific research has also extensively addressed issues of inclusive education, pedagogical innovations, and the integration of digital technologies into primary education. Studies conducted in the field of special (correctional) pedagogy contribute to the formation of the scientific and pedagogical foundations of inclusive education (Adıgüzel, O., Tatlı Dalioğlu, S., & Ergünay, O. 2017, 85–106 p.).

Thus, contemporary research shows that primary education pedagogy is one of the important scientific fields developing both in terms of historical and pedagogical heritage and modern innovative approaches. Research in this area is of particular importance for updating the content of primary education, improving teacher training, and enhancing the effectiveness of the teaching and learning process.

The aim of the article is to investigate the stages of the emergence and development of primary education pedagogy from a historical and pedagogical perspective, as well as to systematize the main scientific ideas and pedagogical approaches that have influenced its formation. At the same time, the study also seeks to identify the directions of development of primary education pedagogy in the modern period and to analyze the scientific foundations of the transition to a learner-centered education model.

To achieve this aim, the following tasks are set:

- to investigate the historical roots of the emergence of primary education pedagogy and its initial stages of formation;
- to analyze the influence of pedagogical ideas from Antiquity, the Middle Ages, the Renaissance, and the Modern period on primary education;
- to study the stages of development of primary education pedagogy in Azerbaijan, with special attention to the role of the Gori Teachers' Seminary and pedagogical courses;
- to analyze the historical development of primary school teacher training and its impact on the education system;
- to evaluate modern innovative approaches and the competency-based learning model applied in primary education pedagogy.

Results and discussion.

The development of primary education pedagogy can be reasonably systematized into the following historical periods:

1. Ancient period (5th century BC – 5th century AD) – at this stage, ideas related to primary education were formed within philosophical thought. In Ancient Greece, issues of upbringing and education were associated with the moral and intellectual development of the individual. Thinkers such as Socrates, Plato, and Aristotle put forward important ideas about the goals of education and the formation of human personality. During this period, primary education did not exist as a separate system but was part of general philosophical views on education.

2. Medieval period (5th–15th centuries) – education was predominantly religious in nature, with schools controlled by the church and religious organizations. Teaching was mainly based on memorization and the study of religious texts. Primary education had a limited character, and individual child development was largely neglected.

3. Renaissance and Early Modern period (16th–17th centuries) – during this period, humanistic ideas became more prominent, and greater attention was paid to the natural development of the child. The scientific foundations of primary education pedagogy began to take shape. A particularly important role in this process was played by Jan Amos Comenius. His work *"Didactica Magna"* and the class-lesson system laid the scientific foundations of modern primary education. The principles of visual learning and natural conformity became the main methodological directions of this period.

4. Classical pedagogy (18th–19th centuries) At this stage, primary education acquired a more systematic scientific foundation. John Locke, Jean-Jacques Rousseau, and Johann Heinrich Pestalozzi developed ideas of the natural development of the child, learning through experience, and individual approach. During this period, primary education gradually began to take shape as an independent pedagogical system.

5. Formation of the scientific-pedagogical system (19th–20th centuries)During this period, primary education pedagogy developed as an independent scientific field. Konstantin Ushinsky laid the foundations of national pedagogy and emphasized the role of the teacher's personality. In the next stage, scholars such as John Dewey and Maria Montessori, among others, developed learner-

centered, developmental, and practice-oriented approaches in primary education (Dewey, 2008, 384 p., Makarenko, 1988, 320 p.).

6. Modern period (20th–21st centuries) In the contemporary stage, primary education pedagogy is developing on the basis of innovative technologies, the competency-based approach, and the learner-centered model of instruction. The use of information and communication technologies in the learning process, interactive methods, and the individualization of education are the main directions of modern primary education.

Primary education pedagogy has undergone a long historical path of development and has formed as an independent scientific system, evolving from philosophical ideas. This process became possible due to the synthesis of pedagogical views that emerged in different historical epochs, and in the modern period, primary education pedagogy represents a comprehensive scientific field aimed at the holistic development of the learner. The practice of upbringing has its roots in the deep layers of human civilization. Education emerged simultaneously with human society. At that time, children were raised without any pedagogical science, even without awareness of its existence. The science of education, in essence, was formed much later–after the emergence of disciplines such as philosophy, astronomy, geometry, and others.

For a long time, pedagogy existed as part of philosophy and only in the 17th century did it emerge as an independent scientific field. However, modern pedagogy is still closely connected with philosophy, as it studies issues related to human development and upbringing. A significant role in the establishment of pedagogy as an independent science was played by the Czech educator Jan Amos Comenius. The principles he introduced–visual learning and natural conformity–as well as the class-lesson system, form the fundamental foundations of modern pedagogical theory and primary education.

The English philosopher and educator John Locke paid special attention to the theory of education and, in his work *"Some Thoughts Concerning Education"*, put forward important ideas regarding the formation of human personality (Aşıkcan, M., & Saban, A. 2020, p. 19–47).

The French Enlightenment thinkers Denis Diderot and Jean-Jacques Rousseau believed that in the learning process priority should be given not to words, but to practical experience and "things."

A particularly important place in the development of primary education pedagogy belongs to the Swiss educator Johann Heinrich Pestalozzi. He recommended that teachers use progressive teaching methods ensuring the comprehensive development of children and also pay special attention to moral education (Adıgüzel, O., Tatlı Dalioğlu, S., & Ergünay, O. 2017, 106 p.).

At the end of the 19th and the beginning of the 20th century, pedagogical research in the United States became particularly intensive. One of the most prominent representatives of this period was John Dewey (Dewey, 2008, 384 p.), whose ideas had a significant impact on the development of Western pedagogy. At the same time, Benjamin Spock's approaches to child upbringing occupied an important place in the formation of humanistic pedagogy. From the beginning of the 20th century, ideas of the child's personality development and self-development came to the forefront of global pedagogy. A particularly important role in this direction was played by the Italian educator Maria Montessori. The methods she developed are based on the principles of the child's free activity, self-learning, and self-education. According to Montessori's approach, a child, under proper pedagogical guidance, is capable of independently identifying and correcting their mistakes (Trabalzini, 2011, p. 7–20).

From a historical perspective, the initial stage of primary school teacher training dates back to the 19th century. During this period, due to the growing demand for teaching staff, specialized pedagogical educational institutions began to be established. Among such institutions, the Gori Teachers' Seminary held particular significance.

The seminary played an important role in training teachers for primary education in the region and laid the foundation for the development of the future system of pedagogical education. During that

period, teacher training was mainly based on practical knowledge and was carried out in the form of short-term instruction.

The teaching profession and its historical development encompass several stages.

• *Early periods (up to the 17th–18th centuries inclusive)* During this period, the teaching profession functioned without an official education system and without structured training programs. Teachers were mainly represented by the following groups:

• *Local religious figures (clergy, priests, or mullahs)* – especially in Europe and the Islamic world (including Azerbaijan), they were the main bearers of education.

• *Community-approved individuals* – people considered literate and morally reliable.

• *Individuals with basic reading, writing, and arithmetic skills* (sometimes farmers, former soldiers, or seasonal workers).

Special pedagogical training or a teacher's certificate was not required during this period. The main selection criteria included:

– basic literacy;

– moral qualities (religiosity, exemplary behavior, and trust from the community);

– in some cases, confirmation from the local clergy or community council.

During this period in Europe (especially in colonial America), teachers were often poorly paid, worked seasonally, and did not view teaching as a permanent career. In many cases, young men used teaching as a temporary stage before moving on to professions such as law or the clergy.

In 1685 in France, Jean-Baptiste de La Salle (1651–1719) founded the first systematic teacher training school (a normal school) in the city of Reims. This is considered one of the earliest serious attempts to organize the training of secular teachers and to open free schools for children from poor families.

Jean-Baptiste de La Salle:

• organized the co-residence and training of teachers;

• trained them in pedagogical methods, the principle of simultaneous (simultaneous-class) instruction, and teaching in the vernacular (French);

• founded the religious teaching congregation of the "Christian Brothers" (Christian Brothers).

This initiative did not become widely widespread; however, it later influenced the development of the system of "normal schools" in Europe (especially in Germany) in the 19th century. Some sources note the existence of earlier seminaries in Germany (Halle, 1706), but the activity of de La Salle is regarded as the first practical model of training secular teachers.

• *Germany:* At the beginning of the 18th century, in some states (including Prussia), teacher preparation began to develop both before entering the profession (pre-service) and during professional practice (in-service). In 1706, a seminary was opened in the city of Halle.

• *Islamic world and Azerbaijan:* In the 17th–18th centuries, schools (madrasahs and maktabs) were mainly under the control of religious figures. Secular or professional teacher training did not exist; instruction was carried out by literate mullahs or individuals selected from the local population.

• *General characteristic of the period: the* teaching profession was perceived more as a duty or a form of charitable activity rather than a professional career. In the 19th century, especially due to reformers such as Horace Mann, the system of "normal schools" became widely disseminated.

• *Early 19th century – initial stage:* the Industrial Revolution and the expansion of mass primary education (common schools) created a shortage of teachers, making the need for systematic teacher training particularly urgent. Normal schools became the main symbol of this stage. Their aim was short-term preparation of teachers for primary classes (usually within 1–2 years).

• *Early examples:* in 1823, a private school was established in the United States by Samuel Hall; in 1839, the first state-funded normal school was opened in Lexington, Massachusetts, under the leadership of Cyrus Peirce. These initiatives were further expanded thanks to the efforts of reformers such as Horace Mann.

Similar processes were also observed in Europe: in the United Kingdom, normal colleges were established in the 1840s with state support, while in Germany and Switzerland the development of the system was influenced by the ideas of educators such as Johann Heinrich Pestalozzi.

At this stage, teacher training programs included elementary subjects (reading, writing, and mathematics), basics of pedagogy, and practical experience through laboratory schools. The majority of teachers were women, as this profession was one of the few available career options for them during that period.

In Azerbaijan (19th – early 20th century), the training of primary school teachers was closely connected with the educational policy of the Russian Empire:

• In the second half of the 19th century, secular primary schools (district schools) began to be opened. Teachers were mainly trained in Russian educational institutions or through short-term courses.

• At the beginning of the 20th century, pedagogical courses and seminaries were established in Baku and other cities. In the 1930s, special training programs for primary school teachers were developed.

In Azerbaijan, at the initial stage, teacher training was mainly carried out in the form of short-term courses and seminaries, and later it was raised to the level of secondary and higher pedagogical education through pedagogical colleges and institutes (including the predecessors of the Azerbaijan State Pedagogical University).

Main features of the initial stage:

– Short-term and practice-oriented training (1–3 years).

– Primary focus on basic subjects and simple pedagogical methods.

– Certification was carried out under state or public supervision.

– Prior to this period, no special education was required to work as a teacher–basic literacy and community approval were sufficient.

Short-term pedagogical courses were the most practical and efficient form of primary school teacher training in the history of Azerbaijan. They were especially widely organized during the period of the Azerbaijan Democratic Republic (1918–1920) in order to address the acute shortage of teaching staff.

Courses of 1918:

• **Locations:** Ganja, Sheki (Nukha), and Zagatala.

• **Number of participants:** 150 trainees were involved.

• **Purpose:** rapid training of primary school teachers and ensuring the nationalization of education (instruction in the native language).

• These courses became one of the first initiatives of the government and were conducted in parallel with the decision to relocate the Gori Teachers' Seminary to Azerbaijan.

In the summer of 1919, the Ministry of Public Education organized more systematic short-term pedagogical courses. These courses trained teachers for primary and lower grades of secondary schools. In 1919, the opening of one-year pedagogical courses was also envisaged, as it was noted that short-term courses were sometimes insufficient. In addition, evening Azerbaijani language courses operated in Baku, Ganja, Shusha, Nukha, Zagatala, and Kazakh.

These courses were highly important during the period of the Azerbaijan Democratic Republic (ADR) in terms of the accelerated nationalization of education and ensuring staffing for primary schools. Alongside the traditions of the Gori Teachers' Seminary, short-term courses became the most efficient means of mass teacher training. The courses were open to both men and women, which contributed to an increase in the number of female teachers.

The Gori Teachers' Seminary was opened in 1876 in the city of Gori (Georgia) with the aim of training teachers for primary schools of the peoples of the South Caucasus (Georgians, Armenians, Azerbaijanis, and others). In 1879, an Azerbaijani (Tatar/Muslim) department was established at the

seminary. The official opening of this department was approved on May 13, 1880. Its purpose was to prepare teachers capable of educating Muslim (Azerbaijani) children in their native language.

The seminary provided a 4-year secondary specialized pedagogical education. Instruction was conducted in Russian; however, native languages and Sharia (religious) subjects were taught separately for each nationality. The Azerbaijani department operated until 1918 (for about 40 years) and during this period trained more than 250 Azerbaijani teachers.

At the end of the 19th – beginning of the 20th century, the Gori Seminary was the main source of local teaching staff for primary schools in Azerbaijan. At that time, there were no higher pedagogical educational institutions in Azerbaijan, so this seminary played the role of the most important center for teacher training.

Graduates of the seminary worked in Russian-Tatar (Azerbaijani) schools in various regions of Azerbaijan (Baku, Ganja, Kazakh, Erivan, etc.), making a significant contribution to the spread of education in the native language. Pedagogical seminaries and pedagogical courses were among the main forms of training teaching staff for primary and secondary schools in the history of Azerbaijani education. Since the second half of the 19th century, these institutions have played an important role in the development of public education, the elimination of illiteracy, and the preparation of national pedagogical personnel.

Conclusions. In conclusion, it should be noted that primary education pedagogy has developed in parallel with the socio-cultural development of human society and has undergone a long and complex evolutionary path. At its initial stage, it existed as part of philosophical and religious ideas; however, over time it transformed into an independent scientific field and, especially since the 17th century, acquired a systematic character.

Pedagogical ideas proposed in different historical periods–humanism, natural conformity, visual learning, individual approach, and learner-centeredness–have significantly influenced the formation of the scientific and theoretical foundations of primary education pedagogy. At the same time, the development of teacher training has played a decisive role in the progress of this field.

The emergence of seminaries, pedagogical courses, and higher education institutions created conditions for the preparation of professional staff for primary education. In Azerbaijan, a particularly important stage was the functioning of the Gori Teachers' Seminary and the pedagogical courses organized during the period of the Azerbaijan Democratic Republic, which played a significant role in shaping the national education system.

In the modern period, primary education pedagogy is developing on the basis of innovative technologies, the competency-based approach, and learner-centered principles, becoming more flexible and effective. This field is no longer limited to the transfer of knowledge; rather, it represents a comprehensive pedagogical system that ensures the holistic development of the student's personality and the formation of creative and critical thinking.

Thus, primary education pedagogy, synthesizing the pedagogical heritage of the past with modern approaches, maintains its significance as a dynamically developing scientific field that forms the basis of the future educational model.

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DOI https://doi.org/10.30525/2592-8813-2026-2-23

DIGITALIZATION OF ENGLISH LANGUAGE TRAINING FOR FIRE AND RESCUE SERVICE PROFESSIONALS: INNOVATIVE APPROACHES AND INTERNATIONAL STANDARDS

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Abstract. The article addresses the issue of digitalization of English language training for fire and rescue service professionals in the context of contemporary challenges related to globalization, international cooperation, and the need for prompt communication during emergency situations. The growing role of international rescue missions, participation in joint exercises, and coordination with foreign partners necessitate a high level of English proficiency, particularly in professional terminology related to civil protection and emergency response.

Special attention is paid to the implementation of digital technologies in professionally oriented English language training. The study analyzes the potential of using online platforms, mobile applications, interactive simulations, virtual learning environments, distance learning systems, and multimedia resources that contribute to the development of communicative competence in future fire and rescue service professionals. It is emphasized that digital tools enable the simulation of real-life professional situations, fostering rapid decision-making skills and effective communication under conditions of risk and time constraints.

Key words: digitalization of education, English language training, professional communication, innovative teaching methods, international standards, mobile learning.

Introduction. The current stage of societal development is characterized by the active digitalization of all spheres of professional activity, particularly education and the specialized training of professionals. For fire and rescue service personnel, knowledge of the English language is critically important both for the exchange of experience at the international level and for the effective use of modern technologies and equipment, instructions, and standards, which are often presented in English.

However, traditional methods of learning English for this category of specialists do not always take into account the specifics of their professional activity and modern digital resources. The lack of an integrated approach that combines professional terminology, practical case studies, and digital learning technologies reduces the effectiveness of language training and limits opportunities for international cooperation.

An additional challenge is the discrepancies in the implementation of international standards for the training of fire and rescue service personnel, which require a high level of English proficiency for communication in crisis situations, participation in international training, and certification. Considering these factors, there is an urgent need to introduce innovative digital methods for developing English language competencies, adapted to the specifics of fire and rescue service activities and international safety standards.

In contemporary academic discourse, the issue of English-language training for fire and rescue service professionals is considered within the broader research direction of emergency language services and the digitalization of professional education. An analysis of publications indicates growing interest in this topic, which is associated with globalization, increased population mobility, and the need for effective communication in emergency situations (Guo X., Xiao D., Guo Y, 2024: 2).

One of the key research areas is the study of the role of language competence in the activities

of emergency response services. Scientific works emphasize that fire and rescue and medical service professionals regularly encounter language barriers that can significantly affect the quality and speed of decision-making in critical conditions. The lack of effective communication in such situations may lead to errors, thereby increasing risks to the lives and health of affected individuals.

In this regard, considerable attention is given to the implementation of digital technologies for overcoming language barriers. In particular, research demonstrates the effectiveness of using mobile applications with ready-made phrases and multilingual support, which enable rapid communication between rescuers and victims (Müller F., Schröder D., Noack E.M., 2023: 2-3). Such tools are an important element of the digitalization of professional activity; however, they cannot fully replace systematic language training for personnel.

A separate line of research focuses on the digitalization of education and the development of training systems for specialists using modern educational technologies. In particular, models for training specialists in "emergency English" are being developed, which include digital platforms, interactive courses, and multi-level competency development systems (Zhan W., 2025: 101). At the same time, the need to integrate such systems with practical tasks and real-life emergency scenarios is emphasized.

An important aspect is also the use of innovative learning technologies, including simulations, virtual environments, and artificial intelligence. Contemporary research shows that simulation models and digital training tools significantly enhance the effectiveness of rescue personnel training, as they allow for the reproduction of complex situations and the development of decision-making skills under stressful conditions (Li, H., Mao, H., Guo, Z., & Shao, Q., 2025: 3).

At the same time, academic works highlight a number of unresolved issues. In particular, studies point to the insufficient development of assessment systems for evaluating the effectiveness of language training in emergency contexts, a limited amount of empirical data, and weak integration of theoretical models with the real practice of emergency services (Li, H., Mao, H., Guo, Z., & Shao, Q., 2025: 4). In addition, there is a fragmentation of approaches to the implementation of digital technologies and a lack of unified training standards aligned with international requirements.

Thus, the analysis of contemporary research indicates the active development of the digitalization of language training in the field of emergency services; however, it also reveals a number of gaps related to insufficient systematization, practical orientation, and standardization of approaches. This creates a need for further research aimed at developing comprehensive innovative models of English language training for fire and rescue service professionals, taking into account international standards and digital capabilities.

Aim and objectives of the study. The aim of the article is to analyze the characteristics of the digitalization of English language training for fire and rescue service professionals, as well as to determine the role of innovative educational technologies and international standards in the development of professional foreign language competence.

To achieve the stated aim, the following objectives are set:

1) to analyze contemporary approaches to the digitalization of the educational process in English language teaching;

2) to identify the specifics of English language training for fire and rescue service professionals;

3) to characterize modern digital tools and platforms that can be used in professionally oriented English language instruction;

4) to examine the role of international standards and practices in the development of foreign language professional competence of future rescuers;

5) to outline prospects for the use of innovative digital technologies in the process of language training for civil protection professionals.

Presentation of the main material. In today's world, the rapid development of digital technologies is significantly transforming all spheres of professional activity, including education and the profes-

sional training of emergency service specialists. Digitalization processes are becoming a key factor in the modernization of the educational environment, opening new opportunities for improving learning efficiency, access to information resources, and the integration of international training standards. According to the requirements of the Ministry of Internal Affairs of Ukraine regarding language training, the development of communicative competence is an integral part of the professional standard of a rescuer (Basic principles of language training, 2019).

As the activities of fire and rescue service professionals involve rapid interaction, quick decision-making, and cooperation with international organizations in the field of civil protection and emergency response, effective communication is essential. In the context of globalization and expanding international cooperation, the English language plays the role of a key tool for professional communication. For fire and rescue personnel, English proficiency is important not only for participation in international training programs, experience exchange, and joint operations, but also for working with international technical documentation, instructions, safety standards, and modern emergency response technologies. In this regard, there is a growing need to improve methods of teaching English for both future and current professionals in the fire and rescue sector.

The digitalization of the educational process creates new opportunities for improving the quality of language training. The use of digital platforms, online courses, interactive learning environments, multimedia materials, mobile applications, and virtual simulations contributes to the development of professionally oriented language competencies. Thanks to these tools, learning becomes more interactive, adaptive, and closer to real conditions of professional activity. Of particular importance are digital simulation technologies, which allow for the modeling of emergency situations and the practice of professional communication in English within the context of real operations.

In addition, an important aspect of modernizing English language training is its orientation toward international standards and practices in the field of rescuers' training. The integration of such standards into the educational process contributes to the harmonization of professional education with European and global requirements, increases the level of professional mobility of specialists, and promotes the development of intercultural communication. The implementation of modern digital technologies in combination with international educational standards makes it possible to form an effective model of professionally oriented English language instruction.

Virtual reality (VR) and augmented reality (AR) are arguably among the most powerful tools for this field. The use of these technologies opens new opportunities for improving English language training for fire and rescue service professionals. As noted by Stoika O., immersive technologies are also becoming a tool for active learning. Virtual simulations make it possible to reproduce complex processes that cannot be carried out or are unsafe in real conditions (Stoika O., 2024: 181). These technologies enable the creation of an interactive learning environment that is as close as possible to real conditions of professional activity. Freina L. and Ott M. also emphasize the significant potential of VR in education. They point to the technology's ability to simulate real-life situations, which is particularly valuable for professions where practical skills are essential (Freina, L., Ott, M. A., 2015: 12).

In contrast to traditional teaching methods, where professional vocabulary is often acquired through textbooks or static images, VR and AR enable trainees to directly immerse themselves in simulated emergency situations. For example, through virtual reality technologies, future rescuers can find themselves in a simulated smoke-filled environment and perform professional tasks using English as a means of communication.

The use of VR for modeling professional scenarios is particularly effective. Interactive 360-degree video simulations make it possible to reproduce various situations related to fire suppression, evacuation of victims, or coordination of rescue units. In such conditions, trainees have the opportunity to practice professional communication in English, including giving commands, coordinating team actions, and responding to changing circumstances during rescue operations. This contributes to the

development not only of linguistic competence but also of communicative competence under stressful conditions that are typical for rescue work.

Augmented reality (AR) is capable of visualizing complex technical processes and mechanisms, which is critically important for developing a deep understanding among students of engineering and technical specialties (Bordiuk O., 2025: 434). The visualization of terminology through augmented reality transforms abstract lexical units into concrete objects of professional activity, increasing the level of specialized vocabulary acquisition by 40 – 50% compared to traditional memorization. For example, when a mobile device camera is pointed at a specific piece of rescue equipment – such as a fire hydrant, hydraulic spreader, or other tool – the screen displays its English name, a brief description, and instructions for use. Such an approach significantly facilitates the acquisition of professional terminology, as it combines visual perception of an object with its linguistic representation and functional purpose. It is also worth noting that virtual reality enables students to conduct experiments in a safe environment without the risk of making mistakes in real conditions, which reduces the fear of failure in learning and increases confidence in their own abilities (Lin, X. P., Li, B. B., Yao, Z. N., Yang, Z., Zhang M., 2024: 2–6).

Thus, the integration of virtual and augmented reality technologies into the English language training of fire and rescue service professionals contributes to improving the effectiveness of learning, developing practical language skills, and fostering readiness for professional communication in real or simulated emergency situations.

Another important element of the digitalization of English language training for fire and rescue service professionals is the use of specialized mobile applications and gamification technologies. Modern digital tools make it possible to organize the learning process in a way that is as accessible and flexible as possible, which is particularly important for emergency service personnel with irregular work schedules. Thanks to mobile technologies, learning materials become available anytime and anywhere, creating conditions for continuous professional development and improvement of foreign language competencies.

One effective approach in this context is micro-learning, which involves presenting educational content in the form of short, structured modules. This format allows cadets and fire and rescue personnel to acquire new vocabulary and professional language structures gradually, at a convenient pace. To implement this approach, digital platforms such as Quizlet or Memrise can be used, enabling the creation of thematic vocabulary sets related to the specifics of rescuers' professional activities. For example, such sets may cover topics related to hazardous materials, first aid provision, or structural fire suppression. The use of interactive flashcards, tests, and repetition exercises contributes to more effective memorization of professional terminology and its practical application.

Gamification also plays an important role in the learning process, as it involves the use of game elements in education to increase learners' motivation and engagement. Interactive platforms such as Kahoot or Wordwall make it possible to create various quizzes and team-based tasks aimed at assessing knowledge of professional vocabulary and international communication standards. In particular, during such interactive sessions, cadets can compete in their knowledge of the International Phonetic Alphabet, radio codes, and specialized terminology used in the professional activities of fire and rescue units.

Such a learning format not only facilitates better knowledge acquisition but also develops skills of rapid response and teamwork, which are extremely important in real working conditions for rescuers. Thus, the integration of mobile applications and gamification elements into English language training makes learning more flexible, interactive, and adapted to the professional needs of fire and rescue service specialists. This contributes to improving the effectiveness of acquiring professional terminology, developing communicative skills, and fostering motivation for continuous improvement of English proficiency.

Another promising direction in the digitalization of English language training for fire and rescue service professionals is the use of artificial intelligence technologies. Modern tools based on Artificial Intelligence (AI) can significantly enhance learning effectiveness through the personalization of the educational process, adaptation of tasks to learners' proficiency levels, and the creation of an interactive environment for language practice. Unlike traditional teaching methods, artificial intelligence can function not only as a supportive tool but also as a kind of conversational partner, enabling cadets to regularly practice professionally oriented communication in English. In particular, the use of multimedia platforms and AI training tools in ESP learning contributes to the intensification of the educational process under martial law conditions.

One effective form of using such technologies is role-playing activities with chatbots. Danyk Y. O. and Kirichenko D. O. note that AI has significant potential to improve every stage of firefighting operations: from forecasting and early detection to resource management and post-incident recovery. The integration of AI enables the rapid processing of large volumes of data, ensuring accuracy and efficiency of analysis, which is critically important for timely emergency response (Danyk Y., Kirichenko D., 2025: 169).

Within such training scenarios, learners can interact with a virtual interlocutor powered by artificial intelligence. For example, the AI conversational partner may simulate communication with a casualty during an emergency situation: describing symptoms of injuries, reporting their location, or requesting assistance in English. In this format, future rescuers have the opportunity to practice asking questions, clarifying information, giving instructions, and coordinating actions in realistic simulated emergency conditions. Such interactive scenarios contribute to the development of communicative competence and also foster readiness to use English in stressful and unpredictable professional situations.

An important direction in the application of artificial intelligence in language training is also the use of voice-based training tools that operate on speech recognition technologies. Such systems allow cadets to practice the correct pronunciation of professional vocabulary and technical terms, which is particularly important for effective radio communication during rescue operations. Through automatic speech analysis, the system can assess pronunciation accuracy, intonation, and clarity of information delivery, as well as provide recommendations for improving language skills. This significantly enhances the quality of professional training for real-life communication conditions, where clarity and speed of information exchange can be critically important.

Thus, the integration of artificial intelligence technologies into the English language training of fire and rescue service professionals creates new opportunities for the development of professionally oriented language competencies, ensures the individualization of learning, and promotes the formation of practical communication skills in simulated emergency conditions.

Another important aspect of the modern digitalization of English language training for fire and rescue service professionals is the use of collaboration platforms and cloud-based resources that enable the integration of international experience and provide access to learning materials anytime and anywhere. Digital hubs are becoming a kind of bridge between educational institutions in different countries, facilitating the exchange of best practices and the development of professional competence in the field of civil protection. Thanks to such resources, cadets can master professional English not only in the classroom but also through collaborative work on realistic tasks and the analysis of practical case studies. One of the most effective tools for collaborative learning is virtual boards such as Miro and Padlet. The use of such platforms allows groups of cadets to jointly solve tactical tasks in English, for example, developing evacuation plans, coordinating team actions, or assessing risks in simulated emergency situations. This interactive learning format not only enhances language practice but also develops teamwork skills and strategic thinking.

Equally important is the use of cloud-based video resources. Sarnovska N. I. emphasizes that the use of mobile learning tools in the process of studying a foreign language helps overcome communication barriers, develop research skills, increase motivation to acquire language skills, and apply them in real interpersonal communication contexts (Sarnska, N. I., 2019: 106).

Therefore, it can be argued that the use of cloud services and mobile applications in teaching English for specific purposes enables the implementation of the concept of lifelong learning for rescuers who work on shift schedules.

Platforms such as YouTube or TED-Ed provide access to video recordings of the work of American and British fire departments, including bodycam footage and training demonstrations. The analysis of such materials allows cadets to become familiar with "live" professional language, observe real communication patterns, and develop listening comprehension skills in English within a specific professional context. This ensures a deeper understanding of terminology, language structures, and standards of behavior in real working conditions of rescuers.

Thus, the integration of collaboration platforms and cloud-based resources into the educational process creates a favorable environment for the development of professionally oriented language competencies, promotes international exchange of experience, and increases the effectiveness of practical English language acquisition for fire and rescue service professionals.

Conclusion. As a result of the conducted research, it has been established that the digitalization of English language training for fire and rescue service professionals is a necessary condition for improving the quality of professional education in the context of modern global challenges. The growing role of international cooperation, participation in joint rescue operations, and training exercises determines the need to develop a high level of foreign language communicative competence oriented toward professional activity.

It has been demonstrated that the implementation of digital technologies, in particular online platforms, mobile applications, interactive simulations, and virtual learning environments, contributes to improving the effectiveness of the educational process. Such tools enable the modeling of real professional situations and the development of skills for rapid decision-making and communication under conditions of limited time and increased risk.

It has been established that the use of innovative methodological approaches, including scenario-based and problem-based learning, as well as digital case studies and training exercises, contributes to a deeper acquisition of professional terminology and the development of practical speech skills among future fire and rescue service professionals.

Special attention is given to the importance of international standards, which ensure the unification of professional communication and enhance the effectiveness of interaction during emergency response operations. Compliance of educational programs with these standards is an essential condition for training competitive professionals.

Thus, the integration of digital technologies and innovative approaches into the process of English language training contributes to the development of professionally oriented communicative competence, increases the readiness of specialists to work in an international environment, and ensures that training meets the modern requirements of the civil protection sector.

The prospects for further research lie in the development of comprehensive digital educational platforms adapted to the needs of fire and rescue services, as well as in the creation of effective assessment systems for evaluating the level of English language proficiency in conditions that closely simulate real professional activity.

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DOI https://doi.org/10.30525/2592-8813-2026-2-24

INTEGRATING ENTREPRENEURIAL COMPONENTS INTO THE VOCATIONAL TRAINING OF EXPERTS: INTERNATIONAL AND UKRAINIAN EXPERIENCE

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Abstract. The article presents a comprehensive study of integrating entrepreneurial components into the system of vocational training of experts. The methodological framework of the investigation is based on a comparative analysis of international ecosystem models (dual, cooperative and phenomenological) and an examination of Ukraine's experience in transforming the educational environment. The study explores the nature of entrepreneurial competence as a cross-cutting meta-competence (*mindset*) that corresponds to the standards of the European *EntreComp* framework. The main outcome of the research is the justification of the authors' hybrid 'Win-Win' model which integrates European quality standards, American rapid prototyping techniques (*Lean Startup*) and national priorities for post-war recovery, particularly in the *Military-tech* sector. A three-stage algorithm for implementing entrepreneurial content has been suggested: from cross-cutting integration into professional training courses to encouraging extracurricular activities. The effectiveness of modern diagnostic tools (pitching, *self-assessment*) and the need to transform educational institutions into 'learning ecosystems' have been demonstrated. Prospects for further research imply the experimental testing of the suggested model in the context of vocational education digitalisation.

Key words: EntreComp framework, dual education system, social responsibility, educational ecosystem, competence-based approach, 'Win-Win' algorithm, Lean Startup, post-war recovery.

Introduction. In the context of global digitalisation, today's labour market requires professionals to possess not only fundamental knowledge but also well-developed entrepreneurial skills. At the national level, this requirement is laid down in the Law of Ukraine 'On Education', where 'entrepreneurship and financial literacy' are defined as one of the key competences for lifelong learning (Law of Ukraine 'On Education', 2017). The sector's future development strategy, as set out in the Strategy for the Development of Higher Education in Ukraine for 2022–2032, emphasises the need to train experts capable of engaging in innovative activities and adapting swiftly to the demands of digital economy (Cabinet of Ministers of Ukraine Order No. 286-r, 2022).

In the global academic literature, this issue is studied in terms of 'entrepreneurial mindset'. Leading international institutions, OECD and UNESCO in particular, define entrepreneurship as the universal ability to transform ideas into financial, cultural or social value (OECD, 2023a; UNESCO-UNEVOC, 2022). The EntreComp framework has become a key tool for standardising this process in the EU; it sets out 15 cross-cutting competences necessary to realise entrepreneurial potential (Bacigalupo et al., 2016).

In Ukraine, the conceptual foundations for transforming vocational education in the context of digitalisation and the challenges posed by martial law are the subject of systems academic research.

In particular, the issues of developing teachers' digital competence and creating an innovative educational environment have been thoroughly examined by V. Radkevych (2024a) and N. Nychkalo (2014). The issues of vocational training in terms of the competence-based approach and pedagogical expertise in the context of contemporary market transformations have been studied by N. Volkova and O. Lebid (2022). The mechanisms for integrating digital tools into the educational process of vocational and technical education are the focus of researchers at the Institute of Vocational Education of the National Academy of Pedagogical Sciences of Ukraine. A common trend of these studies is the justification of the need to transfer to an ecosystem learning model which ensures flexible learning pathways and enables graduates to adapt to digital economy demands (Radkevych, 2024a; Nychkalo, 2014; Volkova & Lebid, 2022).

The aim of the study is to provide a theoretical justification and develop an original hybrid model for integrating entrepreneurial components into vocational training of experts based on the synergy between international experience and the Ukrainian socio-economic context.

Materials and research methods. To achieve the objective, a range of research methods was used: a comparative analysis (to compare the models of the USA, the EU and Australia); a systems and structural approach (to develop a three-level integration model); and a content analysis of the regulatory framework (the Law of Ukraine 'On Education' and the EntreComp strategies). The study was based on a retrospective analysis of educational reforms in Ukraine (2022–2026) and analytical reports provided by international organisations.

Results and discussion. Entrepreneurial competence is regarded as an integrative personality trait encompassing a combination of knowledge, abilities, skills, and value- and motivation-based attitudes. This competence is essential for developing a competitive expert. As I. Seredina argues, in contemporary European educational practice, the preparation for entrepreneurship is impossible without the intensive use of digital technologies. They transform teaching methods and ensure the development of a proactive attitude among students in the context of global economic challenges (Seredina, 2025). The main components of this competence are: creativity, strategic planning, financial literacy and leadership qualities.

Planning and managing project activities require the ability to set objectives, develop effective strategies for achieving them, arrange resources efficiently, monitor task completion and analyse results (Anishchenko et al., 2019). An important component is financial literacy which includes the understanding of economic fundamentals of entrepreneurship, the ability to plan finances, create a budget, assess profitability and control costs (Vygovska, 2025). Equally important are communication skills and leadership qualities which ensure effective interpersonal interaction, the ability to negotiate, work in a team, motivate those involved in the process, and make responsible decisions (Tsaruk, 2026). The list is completed by the ability to assess risks and make management decisions which involves the capacity to analyse potential threats, predict consequences, develop alternatives and make optimal decisions under uncertainty (Oleksiuk, 2025).

International experience highlights a range of effective models for vocational training designed to develop students' entrepreneurial skills. In international practice, considerable attention is paid to institutionally and pedagogically sound approaches that ensure the effective integration of theoretical knowledge and practical skills.

The analysis of international models enables to identify the principles and techniques fostering the development of entrepreneurial thinking, preparing students for independent professional activity, and helping them realise their potential in today's labour market. At the heart of this integration lies a current understanding of the concept of 'entrepreneurship' not merely as the ability to start a business, but as a specific mindset that enables ideas to be transformed into value – financial, cultural or social. That is why the European Union recognises entrepreneurship as one of the eight key competences for lifelong learning. The main tool for its development and standardisation within the education system

is the EntreComp framework (The Entrepreneurship Competence Framework), which elaborates on this approach through a system of interrelated descriptors (Bacigalupo et al., 2016).

The implementation of the European framework for entrepreneurial competence, EntreComp, within the vocational education system of other countries (France and Estonia, in particular) is based on a cross-cutting approach. It involves the integration of three main domains: 'Ideas and Opportunities' focused on developing creativity, strategic vision and ethical thinking by identifying social challenges as a prospect for development; 'Resources' aimed at fostering self-awareness, financial literacy and the ability to mobilise intellectual and material assets; 'Transition to Action' defining willingness for initiative, strategic planning and constructive risk management (Bacigalupo et al., 2016). The practical implementation of this model transforms training of future teachers from the reproductive knowledge transfer into project-oriented activity. It means that students do not merely master teaching techniques but also develop an original project for a digital educational environment or a concept for an inclusive hub applying elements of EntreComp in order to create added social and cultural value in the education space.

An analysis of international experience enables to classify approaches to the development of entrepreneurial competencies according to several key models.

The Scandinavian model: social responsibility and sustainable development. Denmark, Sweden and Finland are currently leading the way in implementing entrepreneurship education in terms of the public good. Within this model, the focus shifts to social entrepreneurship where business is seen as a tool for addressing specific social issues: from inclusion and support for elderly people to greening initiatives. The key tool here is phenomenological learning (Finland) focused on addressing real societal challenges. Instead of studying traditional isolated subjects, learners work on 'phenomena' – comprehensive topics with practical applications. For example, as part of the 'Urban Ecology' module, future experts develop waste recycling business models for their local communities, integrating environmental, economic and social aspects (Finnish National Agency for Education, 2020). A striking example of the practical implementation of this approach is the Team Academy (Tiimiakatemia) methodology. It is based on team coaching and the creation of real companies from the very first year which allows students to develop entrepreneurial skills in their professional activity and within market interaction (OECD, 2023b).

The US model: the university as an innovation hub (Stanford, MIT). The American model focuses on the effective knowledge commercialisation, with the university acting as the centre of an ecosystem that integrates science, business and financial mechanisms for commercialising investments. The key mechanism of this model is the creation of spin-off companies – enterprises based on innovative scientific developments of teachers and students. The universities provide a full cycle of support: from patent legal support to the access to accelerator programmes, such as the Stanford Technology Ventures Program (STVP) specialising in training leaders for high-tech industries (Stanford University). An important mindset feature of the American ecosystem is a 'culture of risk-taking' and mistake tolerance. A start-up failure whilst studying is not viewed as a reputational disaster but rather as a valuable practical experience in managing under uncertainty, which significantly enhances a graduate's market value and their appeal to employers (Massachusetts Institute of Technology, 2023; WIPO, 2024).

The German dual model and intrapreneurship. Germany implements a strategy that combines fundamental academic training with an in-depth practical immersion in production processes. This model is based on the Dual Education (Duale Ausbildung) system, where study time is divided between an educational institution and a company on a 50/50 basis. This ensures not only high qualification but also early professional socialisation of students (BIBB, 2023; Horidko, 2024). A distinctive feature of the German approach is the emphasis on intrapreneurship (internal entrepreneurship). The aim is to train experts capable of initiating innovation, optimising costs and

taking responsibility for the results of their department acting as 'entrepreneurs within the corporation'. This approach allows companies to maintain flexibility and innovation within the established structures (OECD, 2022). Furthermore, contemporary analytical data underlines that such synergy reduces the skills mismatch in the high-tech sectors of the digital economy (OECD, 2023b). The effectiveness of this model is significantly enhanced by the activities of the Steinbeis Foundation network which acts as a mediator in technology transfer processes between universities and representatives of small and medium-sized enterprises (Mittelstand). Involving students in the foundation's consultancy and research projects enables them to master the tools of practical management and innovative logistics whilst still studying (Steinbeis-Stiftung, 2024).

The cooperative model and entrepreneurial universities (USA, Canada, the Baltic states). The cooperative education model is based on the systems integration of academic study with professional work placements, with particular attention being paid to 'practice firms' models. According to the UNESCO-UNEVOC interactive guide (2022), entrepreneurial education in technical and vocational education and training (TVET) institutions is viewed not as a separate course but as a systems transformation of the institution. A key element of this approach is the creation of an 'institutional entrepreneurial ecosystem' encompassing four strategic levels: institutional management, curriculum development, engagement with external partners, and the development of an entrepreneurial culture among students. The experience of the Baltic countries demonstrates the effectiveness of involving future experts in solving real business cases and creating incubators that focus on developing 'entrepreneurial initiative' as a cross-cutting competence for experts. Such firms are currently united in global networks enabling students to conduct virtual cross-border operations whilst mastering international trade skills (PEN Worldwide, 2024). In the Baltic states, particularly in Estonia, this concept has evolved into the 'entrepreneurial university' model, where an educational institution becomes the core of a start-up ecosystem. Universities host incubators and accelerator hubs (for example, *Mektory* at Tallinn University of Technology), which provide mentoring support for projects at the *pre-seed* stage. Research confirms that this approach not only contributes to the creation of new jobs but also fosters a high level of adaptability among students to the conditions of digital economy (European Commission, 2024).

Experiential learning (Australia). The approach to experiential learning in the Australian education system is based on the widespread implementation of *Work-Integrated Learning* (WIL). This model involves students participating in *pro bono* projects and establishing systems partnerships with businesses in the field of applied research. This stimulates technical creativity and willingness to develop high-tech solutions. According to TEQSA reports (2023), this approach helps bridge the gap between theoretical training and the real demands of Industry 4.0 transforming students from passive listeners into active researchers and practitioners. The new National Foundation Skills Strategy for 2025–2035 is of particular significance. It views digital literacy and problem-solving skills not merely as technical competencies but as a fundamental basis for economic participation and innovation. According to the reform concept, the development of 'entrepreneurial thinking' is integrated directly into *VET qualifications* enabling the training of engineering and teaching staff who can adapt the educational process to the requirements of Industry 5.0 (Department of Employment and Workplace Relations, 2024).

An analysis of global practices suggests that the development of entrepreneurial competence within the vocational education system has evolved from teaching the isolated business fundamentals to the creation of holistic innovation ecosystems. In the modern paradigm, entrepreneurship is viewed not merely as a set of economic knowledge, but as a cross-cutting meta-competence that requires a fundamental transformation of the teacher's role. The teacher stops being merely a knowledge transmitter, they become coaches and mentors who possess entrepreneurial mindset and are capable of integrating principles of the EntreComp framework into any academic course.

The fundamental principle underlying all the models discussed is the priority given to *'learning by doing'*. A common feature of international practice is the use of real or simulated business environments which allow students to progress from idea to product in a safe setting. This is reflected in the creation of start-up hubs in the USA, a network of practice firms in the Baltic states, or team-based companies within the Finnish *Team Academy* methodology. This approach ensures not only professional expertise but also the psychological willingness to make decisions under uncertainty.

A key feature of successful models is their ecosystem-based approach and strategic partnerships. Effective professional training is currently impossible without the close integration of education, business and the community. Striking examples of such synergy include Germany's dual system, where an enterprise is a full-fledged learning entity, and Australian *pro bono* projects which combine applied research with addressing societal needs. This creates the conditions for a socio-digital development trajectory where entrepreneurial education focuses on social responsibility and digital adaptability, which is crucial in the context of the transition to Industry 5.0.

These established international benchmarks provide a solid conceptual foundation for analysing the Ukrainian experience. They identify the most viable tools for elaborating an adaptive model to develop entrepreneurial competence, one that would address the specific challenges of transforming vocational education in Ukraine and meet the requirements of post-war economic recovery.

The current state of human capital development in Ukraine is characterised by a systems transformation of vocational and higher education. It is defined by a shift from a rigid academic tradition towards flexible, competence-based learning. In the context of global digitalisation, the development of an entrepreneurial component is no longer merely an educational option but is becoming a strategic priority for national security and economic growth.

The current stage of education sector development (2022–2026) can be described as a period of digital adaptation and mobilised innovative development. Whilst previous stages focused on the theoretical justification of competencies, in accordance with the priorities of the Strategy for the Higher Education Development in Ukraine for 2022–2032, the current stage is characterised by a transition to practice-oriented digitalisation and the strengthening of the autonomy of educational institutions in the context of crisis management (Decree of the President of Ukraine No. 333/2021).

In scientific reports of the Institute of Vocational Education of the National Academy of Pedagogical Sciences of Ukraine (Radkevych, 2024a), this period is identified as a phase of 'crisis resilience and digital leap'. Its key characteristics are content pragmatisation through the reorientation of educational programmes towards training experts capable of self-employment and establishing micro-enterprises in communities; the institutionalisation of start-up culture due to the legal establishment of incubators and centres of excellence; and large-scale digital integration involving the active use of 'Diia. Education' ecosystem resources as an effective tool for rapid development of entrepreneurial skills and ensuring professional mobility of students in the context of post-war recovery.

The legal basis for this transformation is the Law of Ukraine 'On Education' (Article 12) which identifies 'entrepreneurship and financial literacy' as one of the 11 key competences for lifelong learning at all levels. For higher education system, it is further reinforced by the relevant provisions of the Law of Ukraine "On Higher Education", where support for the academic start-up movement is defined as a strategic priority. Such integration of levels enables to create a continuous trajectory: from the development of a basic *entrepreneurial mindset* in vocational education institutions to the implementation of high-tech start-up projects (*spin-offs*) within university incubators. In the context of post-war recovery, this stage requires education to train 'expert-owner' capable not only of professionally performing technical operations but also of effectively managing resources and risks.

An analysis of Ukraine's current regulatory framework, in particular the Strategy for Innovation Sector Development until 2030 and Presidential Decree No. 333/2021, demonstrates a strong alignment between national educational objectives and the European EntreComp framework. The

country is consistently adapting leading international models, as evidenced by the introduction of dual education elements (CMU Resolution No. 1340) following the successful German model, the individualisation of education pathways based on the Finnish experience, and the systems reform of management mechanisms based on Polish practice (Kravchyna, 2017).

These transformations are being put into practice through the development of the academic start-up movement, where leading higher education institutions have already established a powerful infrastructure to support innovations. The examples of such successful implementation include 'Sikorsky Challenge' start-up school at the Igor Sikorsky Kyiv Polytechnic Institute (Sikorsky Challenge, 2024), business incubators at the Kyiv National Economic University, and Centre for Entrepreneurship at the Ukrainian Catholic University (Zygriy, O., & Shchetylova, 2020). These platforms provide students with the opportunity to go through a full project development cycle: from generating an idea to creating a minimum viable product (MVP).

Public-private partnership (PPP) projects are an important addition to this system. In particular, V. Radkevych (2024b) emphasises the crucial importance of establishing sectoral clusters and career development centres. Such institutions enable the integration of real business directly into the educational environment. It facilitates the transition from theoretical learning to practical training of experts able to solve specific problems in transport, agricultural or engineering sectors in the context of the country recovery.

Despite significant progress, there are substantial barriers hindering the development of entrepreneurial potential. They include academic inertia which implies the predominance of theoretical 'teaching about entrepreneurship' over practice-oriented 'teaching for entrepreneurship' as well as a lack of real business experience among teachers which creates a gap between academic knowledge and market realities. As A. Lavoshnyk (2024) states, it is a high-quality academic environment that provides access to mentoring and real case studies and is a decisive factor in developing students' entrepreneurial ambitions. However, its development is often restricted by a lack of seed capital and modern prototyping laboratories (FabLabs). At the same time, a distinctive feature of the Ukrainian context is the growing significance of social entrepreneurship as a recovery driver. In the context of war and the need to reintegrate veterans and internally displaced persons (IDPs), it requires education to train experts capable of creating sustainable businesses to solve social problems. It includes the introduction of modules on business ethics and sustainable development which directly correlates with the Scandinavian model of social responsibility.

In order to arrange the material presented and clearly illustrate the gap between international standards and Ukrainian practice, it is advisable to conduct a comparative analysis of the main parameters of the educational process (Table 1). Such a comparison enables to identify critical points where the Ukrainian system has already made some progress (particularly in terms of regulatory framework) and areas requiring immediate reform, such as assessment methods and material and technical resources. It provides a clear understanding of the strategic directions for adapting foreign experience to the specific conditions of wartime and the post-war period.

Data generalization and retrospective analysis suggest that the development of an entrepreneurial component within the vocational education system is currently not merely a methodological task but a strategic focus of educational policy in the context of the economy's innovative transformation. International experience clearly demonstrates the effectiveness of a comprehensive paradigm integrating a dual training system, the development of an entrepreneurial environment within educational institutions, the operation of model enterprises (training firms) and the development of soft skills through practical training. Despite the challenging conditions of martial law, Ukraine demonstrates positive momentum due to the growth of start-up movement and content digitisation. However, further success requires full integration of education into the national innovation ecosystem with the active participation of both public institutions and private sector (investors, business associations and industry clusters).

Table 1

A Comparative Analysis of Implementing Entrepreneurship Education: Global Trends and Ukrainian Context

Aspect	Foreign experience	Ukrainian Context
Regulatory framework	Clear strategies (e.g. EntreComp, Europe 2020, national entrepreneurship programmes)	The Ukrainian laws 'On Education', 'On Vocational Education', and the New Ukrainian School standards, but the implementation is uneven
Entrepreneurial competence in the programmes	Integrated into all levels of education, including vocational education	Included partially as individual elective courses or short modules
Teaching methods	The use of practice-oriented methods: business simulations, case studies, start-up incubators and work-based learning	The theoretical approach predominates, although there are separate examples of project-based learning
Teacher training	Comprehensive professional development courses, compulsory participation in international training sessions	Limited opportunities for specialised teacher training specifically in entrepreneurship
Facilities	Modern laboratories, FabLabs and start-up centres based directly within educational institutions	Facilities have been partially updated via training and practical centres (TPCs), but are often out of date
Partnership with businesses	Close collaboration with companies, structured business mentoring, a well-established dual system	Partnerships have been established in some institutions, but overall, they are ad hoc in nature
Assessment of results	Comprehensive assessment: presenting business projects, pitching ideas, creating a professional portfolio	Assessment is mainly based on traditional knowledge testing; practical projects are rarely assessed
Students' motivation	High due to the real opportunity to commercialise students' own ideas whilst studying	Moderately low due to a lack of successful local examples and systems support

Compiled by the authors

The development of social entrepreneurship is emerging as a promising direction to modernise the content of vocational education in Ukraine. Unlike traditional commercial models, it focuses future experts on addressing socially significant issues – ranging from environmental safety and inclusion to overcoming socio-economic consequences of war – through the implementation of sustainable business mechanisms. The integration of a social component into students' training, particularly for technical and transport sectors, fosters a synergy between professional expertise and a high sense of civic responsibility, which is a key driver of sustainable development and rapid restoration of communities' social infrastructure.

To systematically incorporate an entrepreneurial component into the educational process, it is advisable to implement a comprehensive three-stage integration model. The *cross-cutting* level involves a widespread incorporation of entrepreneurial case studies into general education and vocational courses, in particular through tasks such as resource optimisation or cost calculation. The *specialised* level is aimed at introducing targeted modules ('Fundamentals of Start-up Design', 'Personal Branding'). The *institutional* level stimulates extracurricular activity by establishing business clubs and organising hackathons. Such structure transforms an educational institution into a holistic ecosystem for developing professional and entrepreneurial competence of future experts.

Particular attention should be paid to diagnostic tools as being an integrative concept, entrepreneurial competence is difficult to measure using traditional tests. International experience

suggests a shift towards authentic assessment which involves the use of e-portfolios to document real achievements, the arrangement of idea pitchings as a format for public project presentation to experts and stakeholders, and the implementation of self-assessment procedures. Based on the descriptors of the European EntreComp framework, self-assessment allows learners to independently track their progress which stimulates reflection and comprehensively measures the development of personal and professional qualities (soft skills).

Drawing on global experience and taking current challenges into account, this framework can be implemented through the authors' 'Win-Win' algorithm. Its strategy is based on the synergy of three key elements. The fundamental component adapts the EntreComp framework to standardise assessment. The instrumental component integrates the Lean Startup methodology with its 'Build-Measure-Learn' cycle to foster flexible thinking through prototype testing rather than writing static business plans. The contextual component ensures the model localisation by taking national priorities into account (military-tech, reconstruction projects, social entrepreneurship). It enables the development of an 'entrepreneurial professional' – a proactive expert capable of transforming obstacles into development opportunities in digital economy.

The effectiveness of the suggested model should be assessed using a comprehensive set of criteria. They range from the development of competencies as defined by EntreComp and the ability to pitch start-up ideas independently to the extent to which the educational institution is integrated into business partner networks. Key indicators include active participation in workshops and incubation programmes as well as the subjective and objective willingness of students for self-employment and a high degree of professional adaptability in a changing market environment.

Table 2

The structure of the authors' 'Win-Win' model for developing entrepreneurial competencies

Model component	Content / Function	Result
The European Commission EntreComp framework	Developing an entrepreneurial mindset, initiative, creativity, financial literacy and risk management skills	Development of entrepreneurial competencies
Lean Startup (Build–Measure–Learn)	Generating and testing ideas through the 'create – test – refine' cycle	Ensuring practice-oriented learning
National priorities (Military-tech, recovery, social business)	Adapting the educational process to the needs of post-war recovery, social entrepreneurship and digital economy	Focus on the country's strategic challenges and needs
The authors' 'Win-Win' model	Integrating the EntreComp standards, the Lean Startup methodology and national priorities into a coherent education system	Training contemporary, competitive experts
An entrepreneurial professional	The development of soft skills, entrepreneurial thinking, the capacity for innovation and self-employment	High professional adaptability and willingness for Industry 5.0.

Source: developed by the authors based on a synthesis of the EntreComp framework, the Lean Startup methodology and Ukraine's national priorities for post-war recovery

The implementation of the authors' 'Win-Win' model involves a phased approach beginning with a *diagnostic phase* aimed at verifying the baseline level of students' entrepreneurial competencies and assessing the teaching staff's willingness for innovative transformations. It is followed by an *arrangement and design phase* which involves adapting educational programmes, establishing partnerships with businesses, and designing a personalised digital environment. A *practice-oriented phase* focuses on the direct implementation of start-up projects, addressing real business cases,

arranging hackathons and scaling up dual education. It logically culminates in a *reflective and evaluative phase* during which participants undertake self-assessment, publicly pitch the solutions they have developed, and conduct a comprehensive evaluation of the effectiveness of the suggested model.

It is anticipated that the systems implementation of the authors' 'Win-Win' model within the academic and scientific sphere will result in achieving a number of strategic outcomes. They include a significant increase in entrepreneurial activity and initiative among students; intensified development of self-employment, strategic planning and project management skills under high uncertainty; strengthened cooperation between educational institutions, representatives of real economy and local communities; comprehensive development of digital and financial literacy as a fundamental basis for personal resilience, as well as training of highly qualified experts capable of rapid professional adaptation according to the requirements of Industry 5.0 and the priority tasks of national post-war economic recovery.

The modernisation of educational space and the shift from traditional lecture-based formats require the design of 'learning ecosystems'. This implies not only architectural changes (the creation of co-working zones for cross-functional teamwork) but also a radical transformation of the teacher's role – from a content disseminator to a mentor, facilitator and educational engineer who guides students on the path from an idea to a viable project. An important component of this ecosystem is the integration of digital platforms to simulate market relations which ensure the development of entrepreneurial initiative and a high level of professional adaptability among future experts in a dynamic digital environment.

Conclusions. The study substantiates the transformation of entrepreneurial competence from a narrowly specialised skill into a cross-cutting meta-competence (mindset) which serves as the foundation for experts' professional self-fulfilment and their ability to turn ideas into economic, social and cultural value. In the current context of digital economy and Ukraine's post-war recovery, entrepreneurship is viewed not merely as a tool for conducting business but as a fundamental feature of a competitive and adaptable professional.

It has been demonstrated that the effective integration of entrepreneurial components into vocational training should be based on the 'learning-by-doing' principle. It is implemented through dual education, practice-oriented case studies, start-up projects, training firms and the simulation of real market processes. An analysis of international experience has confirmed that the most effective models are ecosystem-based ones where education, business, community and digital environment function as interconnected elements of a single innovation space.

It has been established that the European EntreComp framework serves as an effective tool for standardising and assessing entrepreneurial competences. The suggested three-stage integration model (cross-cutting, specialised and institutional levels) ensures the systems incorporation of entrepreneurial content into the educational process without overcrowding the curriculum and also creates conditions to develop entrepreneurial initiative among learners.

Particular attention has been paid to the changing role of a teacher, who, within the current educational paradigm, is no longer merely a knowledge transmitter but takes on the roles of a mentor, facilitator and educational engineer. It is this model of pedagogical interaction that fosters the development of adaptable professionals capable of working under uncertainty, digitalisation and rapid technological change.

By synthesising international practices and Ukrainian experience, an original hybrid 'Win-Win' model has been developed. It combines the European EntreComp standards, the American Lean Startup methodology, and the national priorities for Ukraine's post-war recovery. The suggested model aims at training an 'entrepreneurial professional' – an expert capable of combining professional expertise, innovation, social responsibility and willingness to create their own projects within the context of Industry 5.0.

A promising area for further research implies experimental testing of the 'Win-Win' model in vocational and higher education institutions as well as developing methodological tools for quantitative and qualitative assessment of entrepreneurial competence among future experts.

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DOI https://doi.org/10.30525/2592-8813-2026-2-25

PREPARATION OF FUTURE ENGLISH TEACHERS IN THE CONTEXT OF COMPETENCY-BASED EDUCATION

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Abstract. In the era of globalization, one of the main priorities of higher pedagogical education is the preparation of teaching staff with competitive, creative and professional competencies. In particular, the strengthening of the position of English as a means of international communication has formed new requirements for the preparation of future English teachers. Therefore, the competency-based education model involves the development of practical skills, communicative flexibility, digital literacy and intercultural competencies. The article examines the theoretical and methodological foundations of the competency-based approach, analyzes its role in the professional and methodological training of future English language teachers. Comparative-pedagogical, analytical and descriptive methods were used during the research, and international scientific sources and modern pedagogical approaches were systematically studied. Competency-based education has a significant impact on the development of students' independent thinking, reflective analysis, communicative activity and pedagogical decision-making skills. At the same time, the article examines the role of innovative teaching methods, digital technologies and interactive activities in teacher training from a scientific perspective.

Key words: competency-based education, English language teaching, professional competence, methodological preparation, communicative approach, digital pedagogy, intercultural competence.

Introduction. Structural changes in the education system in the 21st century have necessitated the application of new approaches to the content and organization of teacher training. The teacher performs the function of a pedagogical leader who manages the learning process, uses innovative methods, and forms creative and critical thinking in students. These changes are especially pronounced in the field of training foreign language teachers.

The main goal of training English teachers is the complex formation of communicative, social, cultural, methodological and professional competencies of future teachers. In modern educational conditions, a teacher is required not only to know grammatical rules and lexical material, but also to apply this knowledge flexibly and effectively in various pedagogical situations. Therefore, ensuring the interaction between theoretical knowledge and practical activity in the teacher training process is of particular importance.

In the philosophy of education, the concept of "competence" is characterized as an integrative system of knowledge, skills, personal qualities, values and practical activity components. Competence expresses the ability to purposefully and creatively apply knowledge in real professional activity conditions. According to this approach, the student is not a passive recipient of information in the learning process, but an active participant who analyzes problems and makes independent decisions.

Literature review. The issue of competency-based education occupies a prominent place in modern pedagogical and linguodidactic science. Researchers view the training of future English language teachers as a comprehensive process aimed at developing professional, communicative, digital, and intercultural competencies.

The theoretical foundations of linguistic competence were laid in the works of Chomsky (1965), who viewed linguistic ability as a system of knowledge underlying speech activity. The development of this concept is linked to the research of Hymes (1972), who introduced the concept of communica-

tive competence and emphasized the need for effective language use in specific social and cultural contexts. These ideas became the foundation of modern communicative methods of foreign language teaching.

Richards (2006) noted that communicative teaching focuses not only on the acquisition of grammatical rules but also on the development of practical communication skills. Issues of intercultural competence were further developed in the works of Byram (1997), who identified intercultural communicative competence as a crucial component of foreign language teacher training.

The psychological and pedagogical aspects of the competency-based approach are examined in the research of Piaget (1972), who places particular emphasis on the cognitive development of the individual and the active learning process. Modern international educational documents also emphasize the importance of key competencies. For example, the European Commission (2018) identifies communicative, digital, and social competencies as key components of lifelong learning.

Issues of digital pedagogy and the development of ICT competencies in teachers are reflected in UNESCO documents (2018), which emphasize the need to integrate digital technologies into the educational process. In Azerbaijani pedagogical science, the issue of the competency-based approach is explored by Ahmadov (2019), who analyzes the pedagogical characteristics of competency-based learning and its impact on the professional development of future teachers.

Thus, an analysis of the scientific literature shows that competency-based education is viewed as the most important foundation for preparing modern English teachers capable of functioning effectively in the context of globalization, digitalization, and intercultural communication.

The purpose of this article is to explore the specifics of training future English language teachers in a competency-based education environment, as well as to analyze the role of professional, communicative, digital, and intercultural competencies in developing modern teachers. Furthermore, the article aims to determine the role of innovative teaching methods and digital technologies in improving the effectiveness of professional and methodological training for future English language teachers.

Main text. The competency-based approach is aimed at developing students' skills in reflective thinking, analytical analysis and creative approach. In such a model, future teachers not only learn ready-made methodological schemes, but also are able to form innovative solutions suitable for various pedagogical situations. This approach expands their professional adaptation capabilities and creates conditions for flexible adaptation to the changing educational environment.

The importance of the competency-based approach in the field of foreign language teaching is especially great. Because an English teacher is not only a language teacher, but also performs the function of a pedagogical leader who organizes the communication process, promotes intercultural dialogue and forms independent learning skills in students. The teacher must take into account the individual characteristics of students, increase their motivation and organize the teaching process based on interactive methods.

In this context, communicative competence is considered one of the main components of future teacher training. The teacher must be able to use the language functionally in various communicative situations, create an effective communication environment between students and activate their speech activity. In addition, methodological competence is related to the teacher's correct choice of teaching strategies, application of modern pedagogical technologies and effective organization of the teaching process.

The formation of intercultural competence is also of particular relevance in the context of globalization. Since English is an international means of communication, teachers must form a sense of tolerance, multicultural thinking and respect for cultural diversity in students. This requires future teachers to have socio-cultural knowledge.

In recent years, the reforms implemented in the European higher education area, the Bologna process and international education standards have made the application of the competency-based model

even more relevant. The main goal of this approach is to prepare teachers who meet the requirements of the labor market, have flexible thinking and are ready for professional activity (European Commission, 2018).

The rapid development of digital technologies in recent times has necessitated the formation of new competencies in the teacher training system. The integration of information and communication technologies into the field of education has had a serious impact on the content, methods and organizational forms of the training process. In these circumstances, foreign language teachers are required not only to have high language skills, but also to be digitally literate, technologically agile and able to use innovative pedagogical approaches. A modern teacher must be able to use various digital platforms, manage online and hybrid learning environments, and select and apply electronic resources in accordance with pedagogical goals.

Especially in the post-pandemic period, the widespread use of distance and blended learning models has further increased the importance of teachers' digital competencies. Foreign language teachers must be able to organize interactive lessons on platforms such as Zoom, Microsoft Teams, Google Classroom, Moodle, create a virtual communication environment and ensure the active participation of students. These technologies allow for a more flexible, accessible and student-oriented organization of the teaching process.

Digital technologies also expand the possibilities of personalized learning. Through electronic resources and adaptive platforms, teachers can take into account the individual learning pace of students, prepare tasks tailored to their academic needs, and provide continuous feedback. This has a positive impact on the development of students' independent learning skills and self-management competencies.

In modern pedagogical reality, digital technologies require teachers not only to have technical knowledge, but also to be able to integrate technology with pedagogical goals. Technology should not be an end in itself in the teaching process, but rather a means to improve the quality of learning. In this regard, teachers should correctly assess the methodological capabilities of digital tools and direct them to the development of students' communicative, critical, and creative thinking skills.

The competency-based approach is considered an effective pedagogical model that meets these requirements. This model forms not only the theoretical knowledge of future teachers, but also their skills for practical activity in a digital environment. Competency-based training allows students to use technology creatively, develop innovative pedagogical solutions, and flexibly adapt to the changing educational environment. In the context of digital transformation, the competency-based approach acts as one of the main directions of modern teacher training.

The competency-based education model has become one of the important directions in pedagogical theory since the end of the 20th century. The main idea of this approach is that students should not only acquire theoretical knowledge, but also gain the ability to apply that knowledge in practical situations.

Although the concept of “competence” put forward by Noam Chomsky was initially presented as a theoretical model of language ability, it later acquired a broader meaning in pedagogical science. In modern pedagogical approaches, competence is characterized as the integrative application of knowledge, skills, experience and personal qualities during professional activity (Khutorskoy, 2003).

Dell Hymes explains communicative competence as the ability to use language units appropriately in specific social and cultural conditions. According to the researcher, the speaker must know not only “what to say”, but also “where”, “how”, “to whom” and “in what situation” to speak (Hymes, 1972). This approach has increased the importance of communicative activity, authentic situations and interactive teaching methods in foreign language teaching.

The formation of communicative competence is of particular relevance in the process of training modern English teachers. Because the teacher is not only a person who teaches language rules, but

also performs the function of a facilitator who organizes the communicative activity of students, develops their speech skills and creates a real communication environment. In this regard, it is considered important for future teachers to apply various communicative strategies, use student-oriented approaches and be able to build an interactive pedagogical environment.

Michael Byram, on the other hand, evaluates the formation of intercultural communicative competence as one of the main goals of foreign language education. According to the researcher, a language learner should not only acquire linguistic knowledge, but also be able to understand the culture, value system, behavioral models and communicative norms of other peoples (Byram, 1997). Byram includes tolerance, empathy, respect for cultural differences and the ability to communicate effectively with representatives of different cultures in the structure of intercultural competence.

In the conditions of globalization and international academic cooperation, these competencies are of particular importance for future English teachers. A modern teacher must operate in a multicultural educational environment, form a culture of respect for cultural diversity and open communication in students. For this reason, teaching subjects related to intercultural communication, multicultural education and communicative methodology in higher pedagogical educational institutions is considered one of the important directions of professional teacher training.

Constructivist learning theory is also considered one of the methodological foundations of the competency-based model. According to the constructivist approach, the student does not receive knowledge ready-made, but forms it himself in the process of activity and experience (Piaget, 1972). This principle increases the importance of practical activities and reflective analysis in teacher training.

An English teacher must have multidisciplinary professional competencies. These competencies are not limited to language knowledge, but include methodological, technological, psychological and intercultural skills.

One of the most important competencies is communicative competence. The communicative approach is aimed at developing students' real communication skills in foreign language teaching. Jack C. Richards characterizes the communicative learning model as an interactive pedagogical system based on the functional use of language (Richards, 2006).

Methodological competence is also considered one of the main indicators in teacher training. A teacher must be able to choose various teaching methods, determine strategies in accordance with learning objectives, and effectively organize the teaching process. Problem-based learning, project method, collaborative learning, and reflective approach are widely used in modern pedagogical practice.

Digital competence has become an integral part of teacher activity in modern times. The document "ICT Competency Framework for Teachers" prepared by UNESCO emphasizes that teachers' digital literacy is one of the main components of educational quality (UNESCO, 2018).

Intercultural competence is of great importance in the global educational environment. Since English is an international means of communication, teachers must form a sense of tolerance, multicultural thinking, and respect for cultural diversity in students. This competence creates conditions for students to adapt to the international academic and social environment.

The competency-based education model is considered one of the modern pedagogical approaches that necessitates the systematic and purposeful application of innovative teaching technologies. The main goal of this model is not only the transfer of theoretical knowledge, but also the development of students' practical skills, creative thinking and independent decision-making competencies. In the modern educational environment, digital platforms, virtual classrooms, electronic learning systems, mobile applications and artificial intelligence-based programs have become widely used tools in teacher training. These technologies allow for a flexible, interactive and student-centered organization of the educational process. In the conditions of digital transformation, blended learning and flipped classroom models have gained particular relevance. The blended learning model combines

online learning with traditional classroom lessons and expands students' individual learning opportunities. In the flipped classroom model, students master theoretical materials in advance through digital resources, while classroom time is mainly allocated to practical activities, discussions and problem solving. This develops students' reflective thinking, self-assessment and independent research skills, and at the same time strengthens the role of teachers as facilitators and guides.

Modern digital technologies allow teachers to personalize teaching materials, prepare assignments that are appropriate for students' learning levels, and continuously monitor their academic progress. Learning Management System (LMS) platforms, such as Moodle, Google Classroom, and Microsoft Teams, enhance teacher-student interaction and facilitate flexible assessment and feedback mechanisms. In addition, digital tools also develop students' collaborative activities and teamwork skills.

The use of authentic materials is of great importance in the professional training of future English teachers. External media resources, international news portals, podcasts, TED Talks videos, digital articles, and social media content provide students with a real language environment. These materials develop students' listening, critical analysis, and intercultural communication skills. Working with authentic resources also enables future teachers to master modern language trends and various communicative styles.

The application of artificial intelligence technologies in the field of education has formed a new stage in teacher training. AI-based platforms offer wide opportunities in terms of building personalized learning trajectories, automatic assessment, creating adaptive learning environments, and organizing language practice. Chatbots, virtual assistants, and language analysis programs are used as effective tools in developing students' speech skills. Artificial intelligence-based systems help teachers save time resources and organize the teaching process more efficiently. However, along with the rapid development of technologies, the issue of their ethical use is also becoming relevant. Teachers must adhere to the principles of academic integrity, take into account the risks of plagiarism, and form a culture of digital ethical behavior in students. In addition, it is considered important to apply artificial intelligence technologies in a balanced and consistent manner in accordance with pedagogical goals. Because technology should not replace the pedagogical role of the teacher, but rather serve as a tool supporting his professional activities. As a result, the application of innovative educational technologies in competency-based teacher training makes a significant contribution to the formation of professional, methodological, and digital competencies of future English teachers. This approach ensures that teachers adapt to the changing educational environment and enables them to respond more effectively to modern pedagogical challenges.

Conclusion. The competency-based education model is one of the most effective pedagogical approaches in the preparation of future English language teachers. This model allows developing students' methodological, communicative, digital and intercultural skills. Teacher training should be based on practical activities, innovative technologies and a reflective approach. The competency-based model accelerates students' adaptation to professional activity, forms their creative and critical thinking skills.

Thus, the application of the competency-based approach in the preparation of future English language teachers can be assessed as one of the main development directions of modern higher pedagogical education.

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DOI https://doi.org/10.30525/2592-8813-2026-2-26

ISSUES OF DEVELOPING STUDENTS' SPEECH CULTURE THROUGH THE USE OF FIGURATIVE LANGUAGE DEVICES

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Abstract. The purpose of the present article is to examine, from a pedagogical perspective, the essence of figurative language devices, their place within the linguistic system, and their functional characteristics, as well as to provide a scientific substantiation of their role in the formation of speech culture on the basis of classical and contemporary linguistic theories. As a result of the conducted research, the scientific and linguistic foundations of working with figurative language devices in the teaching of the Azerbaijani language in secondary schools have been identified, and it has been established that methodology plays a significant role in the development of students' speech culture.

One of the principal methods for fostering the development of oral speech in the teaching of the Azerbaijani language in secondary schools is the communicative method. The communicative method implies the practical mastery of language, which, in turn, involves the acquisition of oral speech, reading, and writing skills. Oral speech is taught through the development of speaking and listening comprehension skills. In general, communication occurs between two parties – the speaker and the listener. Effective communication presupposes mutual understanding, that is, the comprehension of transmitted information. In this process, such factors as the participants' age, social affiliation, level of knowledge, subject matter, and communicative purpose play a significant role. Didactic games and dialogues are of considerable importance in fostering effective listening comprehension skills.

The development of science and technology makes it possible to maximize the individualization of Azerbaijani language instruction while simultaneously ensuring collaborative classroom engagement. The proper construction of the methodological system from didactic and psychological perspectives guarantees its practical significance for the future development of students' speech abilities.

The use of figurative language devices in Azerbaijani language lessons plays an important role in the formation of speech culture. The teaching of lexical, phraseological, and syntactic devices enriches students' vocabulary, enhances their ability to express ideas, and increases their emotional expressiveness. Metaphors, metonymy, epithets, and similes impart a creative and individual character to students' speech, while phraseological units enrich it with national and cultural nuances. Syntactic devices strengthen the rhythm, intonation, and communicative impact of speech.

Key words: Azerbaijani language, oral speech, language devices, communication.

Introduction. Language functions not merely as a means of communication, but also as one of the fundamental pillars of national identity, historical memory, and the ideology of statehood. Within the educational system, the presentation of the mother tongue as the principal medium of communication and instruction serves the formation of both the linguistic competence and the national consciousness of the younger generation. In the contemporary period, the development of students' speech culture in the teaching of the Azerbaijani language constitutes one of the priority directions of language education. The correctness, richness, clarity, and expressiveness of speech are directly connected with the purposeful and systematic mastery of figurative language devices. Figurative language devices, while representing significant linguistic units that reflect the aesthetic and expressive potential of language, also play a special role in the development of students' thinking, their emotional and intellectual growth, and their communicative competence.

The objectives of teaching the Azerbaijani language exert a direct influence upon the content and character of instruction. In the lower grades, the problem of instructional content may be resolved using speech models, which may function as potential means of communication. Through the implementation of active learning processes and on the basis of the principle of anticipatory instruction, students are instilled from an early age with independent cognitive activity. They learn to think, develop a desire to acquire knowledge, and form the ability to express their own ideas.

The Linguistic Essence of the Concept of Figurative Language

Language is not solely a means of transmitting information; it is simultaneously a form of expressing human thought, emotional attitude, and aesthetic perception. From this perspective, the concept of figurative language is characterized as a complex linguistic phenomenon that incorporates the semantic, functional, and pragmatic capacities of language. In linguistics, figurativeness is primarily understood as the expression of thought through indirect, figurative, and emotionally expressive means. Figurative language constitutes an important qualitative indicator that enhances the impact of speech, rendering it more vivid, memorable, and communicatively effective.

Although the concept of imagery in Azerbaijani linguistics has been studied predominantly within the context of artistic thinking and literary language, in contemporary pedagogical linguistics the role of this concept in the teaching process has acquired particular relevance. A. Akhundov characterizes imagery as "a generalized reflection of reality in human consciousness, enriched with emotional and aesthetic nuances," emphasizing that it is realized through language. This approach confirms that figurative language possesses not only an aesthetic but also a cognitive essence. T. Hajiyev, in turn, associate's figurativeness with the expressive capacities of language and notes that figurative language devices constitute one of the principal indicators demonstrating the richness and developmental level of the national language.

In the works of such scholars conception of "language and thought" provides an important theoretical foundation for revealing the linguistic essence of figurative language. According to Rajabli, a word expresses not only a concept but also an image, and this image is manifested in the internal form of the word. This idea is of considerable significance for explaining the cognitive foundations of figurative language and resonates with contemporary methodological approaches (Rəcəbli, 2002).

In contemporary English linguistics, particularly within the framework of cognitive linguistics, the concept of figurative language is interpreted from a new perspective. According to the theory of metaphorical thought advanced by George Lakoff and Mark Johnson, figurative language is not merely a characteristic of literary discourse, but one of the fundamental mechanisms of everyday thought and communication. In their view, human beings perceive the world through metaphors, and these metaphors are expressed through language. This approach demonstrates that, from a methodological standpoint, restricting the teaching of figurative language exclusively to literary texts cannot be considered adequate (Lakoff, Johnson, 2003).

From a linguistic perspective, figurative language emerges as a result of the semantic transformation of linguistic units. The transition of a word from its direct meaning to a figurative one, its contextual renewal, and the acquisition of emotional and evaluative connotations constitute some of the principal mechanisms of figurativeness. In this process, lexical, phraseological, and syntactic units perform a particularly significant function. Such figurative devices as metaphor, metonymy, simile, epithet, and hyperbole expand the nominative function of language, endowing it with expressiveness and aesthetic value.

From the standpoint of pedagogical linguistics, the essence of the concept of figurative language is directly connected with its instructional potential. As figurative language devices become increasingly activated in students' speech activity, their vocabulary is enriched, their expressive abilities are developed, and the communicative qualities of speech are formed. In this respect, figurative language functions not only as a linguistic category, but also as a methodological one. The scientifically

grounded presentation of the concept of figurative language in Azerbaijani language lessons plays an important role in the formation of students' speech culture.

From a methodological perspective, the explanation of the concept of figurative language must be carried out with due consideration of students' age characteristics, language proficiency, and communicative objectives. Limiting instruction merely to the terminological definition of figurative language does not produce the expected results within the teaching process. On the contrary, it is essential to reveal the functional essence of figurativeness and to ensure that students comprehend the effect it produces in speech. This, in turn, requires the unity of linguistic theory and methodological application.

Thus, the concept of figurative language represents a multidimensional linguistic phenomenon that integrates the semantic, cognitive, and communicative capacities of language. The study of its essence on a scientific basis and its interpretation within a pedagogical context enhance the methodological effectiveness of work carried out on figurative language devices in Azerbaijani language lessons and create the foundation for the formation of students' speech culture.

Classification and Linguistic Characteristics of Figurative Language Devices (Lexical, Phraseological, and Syntactic Aspects)

Figurative language devices constitute one of the principal linguistic units through which the expressive and aesthetic capacities of language are realized. These devices not only increase the impact of speech, but also create conditions for the fuller, more memorable, and emotionally nuanced expression of thought. From the perspective of the methodology of teaching the Azerbaijani language, the scientifically grounded classification of figurative language devices ensures their purposeful and systematic mastery within the instructional process. It is precisely for this reason that the study of the linguistic characteristics of figurative language devices across lexical, phraseological, and syntactic aspects acquires particular pedagogical relevance.

Although the classification of figurative language devices in linguistics is carried out according to various criteria, from a pedagogical and methodological perspective, their grouping according to lexical, phraseological, and syntactic aspects is considered more appropriate. This approach enables students to comprehend linguistic units from both structural and functional perspectives.

Lexical figurative language devices arise because of semantic transfer and expansion within the semantic structure of a word. In this process, a word moves away from its direct nominative meaning and acquires figurative, emotional, and evaluative connotations. As A. Akhundov notes, "the figurative meaning of a word is one of the principal factors expanding the expressive capacities of language" (Akhundov A., 1988, p. 112).

Within the Azerbaijani language, the principal forms of lexical figurativeness comprise metaphor, metonymy, synecdoche, simile, epithet, hyperbole, and litotes. Among these devices, metaphor occupies a particularly significant position both in functional terms and with regard to its productivity. Viktor Vinogradov characterizes metaphor as "the leading mechanism of the semantic development of language," emphasizing that it represents not merely a phenomenon of literary discourse, but an integral element of the general linguistic system (Vinogradov, 1972).

In contemporary cognitive linguistics, metaphor is interpreted as a structural component of human cognition. George Lakoff and Mark Johnson argue that individuals conceptualize abstract notions through metaphorical models and that these models are actively realized in everyday speech practice (Lakoff, Johnson, 2003). This approach substantiates the methodological necessity of teaching metaphor in Azerbaijani language classes not solely within the framework of literary texts, but also on the basis of communicative speech patterns and everyday linguistic practice.

Metonymy and synecdoche likewise constitute significant forms of lexical figurativeness. According to Alexander Potebnya, semantic transfer in these devices occurs on the basis of associative relationships and gives rise to figurative generalization within human consciousness (Potebnya,

1989). The purposeful application of such devices in students' speech contributes to the conciseness of expression and strengthens its logical density, both of which represent essential indicators of a developed speech culture.

Epithets and similes, by contrast, are characterized by their descriptive and evaluative nature, foregrounding the emotional dimensions of imagery. T. Hajiyev emphasizes that these devices reflect the aesthetic capacities of the national language and play a substantial role in the formation of students' literary and aesthetic perception (Hajiyev, 2001).

Phraseological units constitute the most stable stratum of figurative language and represent a layer particularly rich in national and cultural content. These units' function in fixed form, possess semantic integrity, and are distinguished by a high degree of expressiveness. Gibbs defines phraseological units as the "emotional and expressive reserve fund of language," emphasizing their capacity to enhance the communicative force and expressive potential of speech (Gibbs, 1994).

Phraseological units form the most stable and nationally marked layer of figurative language, enriched with distinctive cultural nuances. Their principal linguistic characteristic lies in the fact that their constituent elements lose their independent lexical meanings and acquire a generalized figurative meaning within the phraseological whole. This semantic indivisibility determines both their linguistic specificity and their pedagogical significance.

In the Azerbaijani language, phraseological figurativeness reflects the people's worldview, everyday life, and historical experience. In this respect, phraseological units function not only as linguistic phenomena, but also as carriers of cultural memory. Expressions such as "to keep one's eyes fixed on the road in expectation," "to feel a foreboding in one's heart," and "to rush about in agitation" create complete figurative images and significantly intensify the emotional and expressive impact of speech.

From a methodological perspective, the teaching of phraseological units requires a differentiated and specialized approach. Any disruption of their semantic unity diminishes their figurative force and weakens their communicative effect. For this reason, phraseological figurativeness should be taught within contextualized discourse and on the basis of situational tasks rather than through isolated memorization. Such an approach contributes positively to the development of students' linguistic intuition and ensures the naturalness and expressiveness of their speech production.

In the Azerbaijani language, the figurativeness of phraseological units is explained by the fact that their components move beyond independent lexical meanings and acquire a generalized figurative sense. For example, expressions such as "one's heart coming to one's mouth" and "one's eyes not trusting the water" create vivid figurative representations of specific situations and generate a strong emotional effect within speech. F. Veysalli associates this characteristic of phraseological units with their pragmatic function, emphasizing their role in shaping the expressive and communicative dimensions of discourse (Veysalli, 2010).

From a methodological standpoint, the instruction of phraseological figurative language devices necessitates particular attention and a differentiated pedagogical approach. Priority should not be assigned to the mechanical memorization of these units; rather, it is essential that students acquire a comprehensive understanding of their etymological origin, semantic integrity, and communicative-pragmatic function. The assimilation of phraseological figurativeness yields more effective results when realized through contextualized and situational tasks, as such an approach enables students to perceive phraseological units not as isolated lexical formations, but as functionally active components of authentic discourse.

Syntactic figurative language devices constitute those linguistic means through which expressiveness is achieved within the structural organization of speech. This category encompasses such syntactic forms as inversion, rhetorical questions, exclamatory sentences, parallel constructions, repetition, and ellipsis. Gibbs characterizes syntactic figurativeness as the expressive organization of the intonational and semantic structure of speech, emphasizing its role in the enhancement of communicative impact and stylistic effect (Gibbs, 1994).

The fundamental characteristic of syntactic figurativeness resides in its contextual and functional nature. An identical grammatical construction may produce distinct emotional and expressive effects depending upon the communicative situation in which it is employed. In this respect, syntactic figurative devices perform a significant function in the development of students' stylistic competence and in the formation of their ability to make linguistically appropriate choices in accordance with communicative intention.

The work carried out on syntactic figurativeness within Azerbaijani language instruction contributes substantially to the development of students' abilities in text construction, the logical emphasis of thought, and emotional expression. Rhetorical questions and exclamatory sentences increase the persuasive force and expressive intensity of oral speech, whereas parallel constructions and repetitions ensure the rhythmic coherence and semantic integrity of the text.

Consequently, the classification of figurative language devices according to lexical, phraseological, and syntactic aspects makes it possible to reveal, in a systematic manner, both their linguistic essence and their functional potential. Such a classification, grounded in both classical and contemporary linguistic scholarship, strengthens the scientific and methodological foundations of work conducted on figurative language within Azerbaijani language instruction and purposefully contributes to the formation of students' speech culture.

The principal linguistic characteristic of syntactic figurative devices lies in the fact that they are determined less by structural form than by functional significance. The same grammatical construction may generate different figurative effects in different contextual environments. From this perspective, syntactic figurativeness is inseparably connected with the communicative purposes of speech and with the pragmatic intention of the speaker.

Within Azerbaijani language lessons, the study of syntactic figurativeness serves the development of students' text-building abilities and the formation of their stylistic choices. Rhetorical questions and exclamatory sentences contribute to the strengthening of emotional emphasis in students' speech, while inversion and parallel constructions create conditions for increasing the dynamism and expressive force of utterance.

Thus, the classification of figurative language devices according to lexical, phraseological, and syntactic dimensions provides an opportunity for a deeper understanding of their linguistic essence and functional significance. This classification ensures the systematic organization of work on figurative language in Azerbaijani language lessons, contributes to the formation of students' speech culture, and promotes the development of their communicative competence. The purposeful application of each group of figurative language devices within the instructional process creates favorable conditions for the enhancement of pedagogical effectiveness.

Figurative language devices constitute one of the principal linguistic mechanisms through which the expressive and stylistic potential of language is realized. These devices reflect not only the semantic content of thought, but also the speaker's attitude, emotional state, and evaluative position. Although the classification of figurative language devices in linguistics is carried out on the basis of various approaches, from the perspective of the methodology of teaching the Azerbaijani language, their grouping according to lexical, phraseological, and syntactic aspects is regarded as more functional and didactically effective (Akhundov, 1988; Hajiyev, 2001).

Cognitive and Psycholinguistic Foundations of Figurative Language Devices

The comprehension of the essence of figurative language devices cannot be confined solely to structural-semantic analysis; rather, it is equally necessary to examine them in their interrelation with human cognition and psychological activity. From this perspective, the cognitive and psycholinguistic foundations of figurative language acquire particular significance within the methodology of teaching the Azerbaijani language. Students' perception, assimilation, and active use of figurative expressions in their own speech are directly connected with the level of development of their cog-

nitive processes, and the scientifically grounded organization of this process substantially increases the effectiveness of instruction.

Within cognitive linguistics, figurative language is understood as the linguistic expression of the mechanisms through which human beings perceive and conceptualize the world (Lakoff & Johnson, 1980). According to this approach, individuals comprehend abstract notions through more concrete, familiar, and everyday experiences. Conceptual metaphor theory demonstrates that images created through language perform not only an artistic and aesthetic function, but also a cognitive one. For example, expressions such as "time flows" and "an idea is born" create specific figurative models in human consciousness, and these models facilitate students' acquisition of abstract concepts.

According to George Lakoff and Mark Johnson (1980), metaphor is not merely a decorative device of speech, but also one of the fundamental mechanisms underlying the structuring of human thought. This approach demonstrates that figurative language devices function as active instruments in students' acquisition of new knowledge, establishing connections between prior knowledge and new information and creating conditions for the strengthening of cognitive integration. This aspect possesses particular importance in the teaching of the Azerbaijani language, since, as students come to understand figurative expressions, they simultaneously develop both their linguistic competence and their logical-cognitive abilities.

Figurative devices such as metaphor and metonymy not only contribute to the formation of students' abstract-logical thinking but also develop their capacity for logical analysis based on everyday life experience (Kövecses, 2005). For example, expressions such as "heartache" or "a wise choice" combine both concrete and abstract experiences, thereby raising the student's level of conceptual understanding. This confirms the pedagogical function of figurative language devices, namely, their capacity to stimulate students' thinking processes and to provide opportunities for a deeper comprehension of new knowledge.

From a psycholinguistic perspective, figurative language devices perform a special role in the processes of speech perception and production. Psycholinguistics demonstrates that figurative expressions function not only as means of transmitting information, but also as stimuli that evoke emotional responses and leave a more enduring trace in memory (Zeynalov, 2012). According to theory concerning the relationship between language and thought, the internal form of the word creates an image within human consciousness, and this image performs a central role in the formation of concepts. This approach is particularly significant for explaining the psychological mechanism of figurative language, since through figurative expressions students assimilate both semantic meaning and emotional content simultaneously.

Taking into consideration the psychological characteristics peculiar to children and adolescents, the application of figurative language devices within the instructional process acquires particular pedagogical relevance. Psychological research demonstrates that, among school-age children, concrete-imagistic thinking occupies a more dominant position than abstract-logical reasoning (Gibbs, 1994). For this reason, figurative language devices perform the function of an essential cognitive bridge in the assimilation of new knowledge. Information presented through figurative expression is perceived by students with greater ease and is more readily incorporated into their active speech practice.

From a psycholinguistic perspective, one of the most significant characteristics of figurative language resides in its emotional impact. Figurative expressions establish an evaluative attitude within speech, reflecting both the speaker's position and emotional state. This, in turn, strengthens mutual understanding within the communicative process (Kövecses, 2010). Work carried out on figurative language devices in Azerbaijani language lessons exerts a positive influence upon students' emotional and intellectual development, as well as upon the formation of empathy and communicative competence. Through the analysis of figurative expressions, students not only expand their linguistic knowledge, but also develop their emotional sensitivity and intellectual capacities.

From a methodological standpoint, due consideration of the cognitive and psycholinguistic foundations of figurative language determines the appropriate selection of instructional strategies. The principal objective should not consist in the mechanical memorization of figurative expressions, but rather in ensuring that students comprehend the reasons for their formation, the semantic relationships they embody, and the emotional effect they produce. This necessitates the application of such methods as problem-based learning, comparative analysis, contextual tasks, and discussion. Such methods increase both the cognitive and emotional involvement of students and render the process of mastering figurative expressions deeper and more effective (Mark Johnson, 1992).

Furthermore, the application of figurative language devices in instruction contributes to the reduction of cognitive load. When students comprehend complex abstract notions through concrete and familiar images, their cognitive resources are utilized more efficiently. This increases the productivity of instruction and enhances students' motivation (Gibbs, 1994). For example, the metaphor "the sea of knowledge" replaces complex information with an image that is more readily assimilated both visually and semantically, thereby elevating students' level of understanding and ensuring their active participation in the learning process.

Consequently, the cognitive and psycholinguistic foundations of figurative language devices substantiate the scientific and pedagogical necessity of their use within the instructional process. These devices activate students' thinking, stimulate speech activity, and create a solid psychological foundation for the formation of speech culture. Work carried out on figurative language devices in Azerbaijani language lessons must therefore be grounded in cognitive and psycholinguistic regularities, since such an approach ensures both the theoretical validity and the practical effectiveness of instruction.

Thus, the application of cognitive and psycholinguistic principles in the teaching of figurative language devices, together with due consideration of their influence upon students' cognitive and emotional development, significantly enhances the effectiveness of instructional strategies and renders the process of language acquisition more productive. Research conducted in this direction demonstrates that the purposeful use of figurative language devices in classroom practice contributes to the development of students' speech skills, logical and abstract thinking, and ultimately improves the overall quality of the educational process.

The Role of Figurative Language Devices in the Formation of Speech Culture

The formation of speech culture constitutes one of the principal objectives of teaching the Azerbaijani language. Speech culture is not confined solely to grammatical correctness and lexical richness; it also encompasses such qualities as expressiveness, purposiveness, emotional impact, and stylistic adequacy of speech. Figurative language devices perform an important pedagogical and linguistic function in the development of these qualities. Figurative language transforms speech from a mere instrument of information transmission into a vivid, expressive, and communicatively effective means of interaction.

In linguistics, the concept of speech culture is interpreted as the normative, expedient, and aesthetically appropriate use of linguistic units. A. Akhundov characterizes speech culture as "a system of skills ensuring the optimal use of language within the process of communication," emphasizing that expressiveness occupies a particularly significant place within this system. It is precisely this expressiveness that is ensured through figurative language devices. The activation of figurative devices in students' speech enables them to express their thoughts with greater precision, completeness, and communicative impact.

The influence of figurative language devices upon speech culture manifests itself, first and foremost, at the lexical level. Metaphors, epithets, similes, and other lexical figurative devices enrich students' vocabulary not only quantitatively, but also qualitatively. As T. Hajiyev notes, figurative words and expressions constitute the "emotional memory" of language, and it is this memory that ensures the vitality and vividness of speech. As students increasingly employ figurative lexical units, their

speech moves away from stereotypical expressions and acquires an individual and creative character, which constitutes one of the most significant indicators of speech culture.

Phraseological figurative language devices create broader communicative possibilities in the formation of speech culture. Phraseological units endow students' speech with naturalness, national coloring, and emotional depth. According to Lakoff, phraseology performs the function of the "emotional skeleton" of speech. The purposeful teaching of phraseological figurativeness in Azerbaijani language lessons creates the conditions for students to establish communication in both spoken and written discourse that is normatively appropriate and, at the same time, expressive. This, in turn, contributes to the formation of the social and communicative aspect of speech culture (Lakoff, 2003).

Syntactic figurative language devices, in turn, play an important role in the development of the structural and stylistic dimensions of speech culture. Rhetorical questions, exclamatory sentences, inversion, and parallel constructions intensify emotional emphasis in students' speech and create the conditions for the logical and intonationally appropriate organization of thought. As Lakoff's emphasizes, syntactic expressiveness constitutes one of the principal means not only of enhancing the aesthetic quality of speech, but also of increasing its communicative impact. When students employ these devices appropriately and purposefully, their speech achieves balance from both logical and emotional perspectives.

From a psycholinguistic perspective, figurative language devices facilitate speech perception and leave a more enduring trace in memory. Since figurative expressions evoke an emotional response, they are assimilated more rapidly by both listeners and readers. This characteristic is of particular significance within the instructional process. Students retain figurative speech patterns more quickly in memory, imitate them, and attempt to apply them in their own speech practice. Thus, figurative language devices perform a psychologically stimulating function in the formation of speech culture.

From a methodological standpoint, the role of figurative language devices in the formation of speech culture depends upon the manner in which they are integrated into the instructional process. The principal objective should consist not merely in their theoretical explanation, but in their practical application within speech activity. Contextual tasks, observations based on textual analysis, creative writing assignments, and oral speech exercises create the necessary conditions for the functional assimilation of figurative language. In this process, students come to understand the effect produced by figurative expressions in speech and learn to select them appropriately in accordance with communicative purposes.

In accordance with contemporary pedagogical approaches, the formation of speech culture is grounded in the communicative-competence model. Within the framework of this model, figurative language devices constitute an essential component of communicative competence. The theory of metaphorical thought advanced by George Lakoff and Mark Johnson further substantiates the proposition that figurativeness represents a natural and inevitable phenomenon of human communication. From this perspective, the systematic organization of the use of figurative language devices in Azerbaijani language instruction creates the necessary conditions for students to construct effective speech in authentic communicative situations.

Accordingly, figurative language devices contribute to the development of such fundamental qualities of speech culture as lexical richness, emotional expressiveness, stylistic appropriateness, and communicative effectiveness. Purposeful and scientifically substantiated work on these devices in Azerbaijani language lessons ensures the formation of students' speech from both normative and aesthetic perspectives and creates favorable conditions for their development as individuals possessing a high level of speech culture.

The Linguistic Substantiation of Work on Figurative Language in Azerbaijani Language Lessons

The effective organization of work on figurative language devices in Azerbaijani language lessons necessitates its foundation upon solid linguistic principles. Whenever the methods and means employed

within the instructional process fail to correspond to the objective regularities of language and to its semantic and functional characteristics, the anticipated pedagogical outcome remains unattainable. From this standpoint, work on figurative language is to be regarded not merely as a methodological technique, but rather as a systematic activity grounded in the achievements of linguistic science.

From a linguistic perspective, work on figurative language is constructed on the basis of the unity of the semantic, functional, and pragmatic levels of language. The teaching of the structural characteristics of linguistic units alone proves insufficient for revealing the essence of figurativeness. As A. Akhundov emphasizes, the actual value of linguistic units is determined by the functions they perform within speech. This proposition necessitates the recognition of the functional-semantic approach as the principal methodological principle in the teaching of figurative language devices.

Conclusion. One of the most significant aspects of the linguistic substantiation of work on figurative language in Azerbaijani language lessons consists in the scientifically accurate presentation to students of the relationship between the direct and figurative meanings of words. Lexical figurativeness emerges as a result of the semantic development of language, and this process is conditioned by the internal resources of the language system itself. Once students come to recognize that the figurative meaning of a word constitutes not an arbitrary artistic embellishment, but rather an objective linguistic mechanism inherent in the semantic structure of language itself, their perception of figurative expressions undergoes a substantial transformation, resulting in the conscious and purposeful employment of such devices in their own speech practice.

The linguistic substantiation of work on phraseological figurative language likewise possesses particular significance. Phraseological units are characterized by stable semantic structures within the language system, and their meaning cannot be explained as the mere sum of the meanings of their individual components. Failure to take this fact into account results in the incorrect perception of phraseological units and in their inadequate use in speech. The studies of F. Veysalli demonstrate that, for the successful assimilation of phraseological units, primary consideration is to be given to their semantic integrity and pragmatic function. From a methodological perspective, this necessitates the teaching of phraseological figurativeness on the basis of an explanatory-conceptual approach.

The linguistic substantiation of work on syntactic figurative language, in turn, is grounded in the structural-semantic organization of speech. Syntactic devices determine not only the grammatical structure of the sentence, but also its intonational and emotional coloring. Lakoff's observations concerning syntactic expressiveness demonstrate that modifications in sentence structure significantly increase the communicative force of speech. In Azerbaijani language lessons, the teaching of such syntactic figurative devices as inversion, rhetorical questions, and exclamatory sentences is carried out with due consideration of these linguistic regularities.

Another significant aspect of the linguistic substantiation of work on figurative language is the principle of normativity and communicative appropriateness. In the formation of speech culture, the decisive factor lies not merely in the abundance of figurative devices employed, but in their selection in accordance with the communicative situation, stylistic context, and pragmatic intention. As T. Hajiyev observes, once expressiveness exceeds the boundaries of linguistic norm, it no longer contributes to the elevation of the cultural level of speech; on the contrary, it weakens it. From this perspective, the adoption of normative-semantic criteria as the principal foundation for the teaching of figurative language constitutes a linguistic necessity.

Linguistic substantiation likewise encompasses issues related to age characteristics and levels of language proficiency. The presentation of figurative language devices without due consideration of the stages of linguistic development characteristic of schoolchildren may impede their accurate assimilation. For this reason, work on figurative language must be organized in accordance with the principle of gradual progression, whereby simpler and more transparent figurative models are introduced at the initial stages, while more complex figurative structures are presented at subsequent

stages of instruction. Such an approach is fully consistent with the objective regularities governing language development.

The linguistic substantiation of work on figurative language in Azerbaijani language lessons is closely connected with the semantic development of language, its functional capacities, and its normative principles. When these foundations are taken into account, figurative language devices cease to function for students merely as terminological units or literary embellishments and instead emerge as essential components of effective and culturally appropriate speech construction. It is precisely this approach that ensures the scientific validity and pedagogical effectiveness of methodological work carried out on figurative language.

Linguistic substantiation demonstrates that the assimilation of figurative language devices must be grounded in the semantic, functional, and pragmatic levels of the word. The instructional process must proceed on the basis of expediency, normativity, and situational relevance. Under such conditions, students come to recognize not only the aesthetic, but also the communicative and cultural functions of figurative devices. As a result, systematic and scientifically substantiated work contributes to the development of all principal indicators of speech culture, namely correctness, expressiveness, stylistic appropriateness, and communicative effectiveness.

Thus, the purposeful use of figurative language devices in Azerbaijani language lessons enriches students' speech, develops their thinking and creative cognition, and creates favorable conditions for the formation of a highly developed speech culture.

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DOI https://doi.org/10.30525/2592-8813-2026-2-27

TRANSFORMATIVE PROCESSES OF DIGITALISATION IN HIGHER EDUCATION: HISTORICAL AND ANALYTICAL ASPECTS

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Abstract. This article examines the transformative processes of digitalisation in higher education from historical and analytical perspectives. The relevance of this research stems from the rapid development of information and communication technologies, the need to modernise the higher education system, and the integration of Ukrainian higher education institutions into the global digital educational space. The evolution of digitalisation is analysed, from the stages of computerisation and internetisation to the current digital transformation, which encompasses the use of digital platforms, cloud services, artificial intelligence and innovative educational technologies. The main principles and strategic directions of the digital transformation of universities are identified. It has been established that digitalisation contributes to improving the quality of education, developing digital competence and modernising the educational environment; however, it requires a systematic approach, the development of digital infrastructure and the assurance of information security.

Key words: digitalisation of education, digital transformation, higher education, digital technologies, digital competence, information and communication technologies.

Introduction. The current stage of development of the global higher education system is characterised by large-scale transformative processes linked to the rapid development of digital technologies, information and communication systems, and the globalisation of the educational landscape. The digitalisation of society, changes in professional practice, the emergence of new forms of communication and the transformation of the labour market are having a significant impact on the functioning of higher education institutions, necessitating a rethinking of traditional approaches to the organisation of the educational process. In such conditions, the digitalisation of higher education is not merely a technological phenomenon, but a comprehensive socio-pedagogical process encompassing changes in educational models, teaching methods, management systems, academic communication and the professional training of future specialists. An analysis of scientific research suggests that contemporary global challenges, driven by the dynamic development of information and communication technologies, the proliferation of digital platforms, the automation of professional activities, and increased international competition in the educational services market, identify digitalisation as one of the priority areas for the modernisation of national higher education systems (Kremen, Luhovyi, Saukh, 2021). In today's information society, digital technologies are becoming a key tool for ensuring the accessibility, quality and competitiveness of education. This is precisely why the issue of digital transformation in higher education is becoming particularly relevant in both the global and Ukrainian educational spheres.

It is important to emphasise that, against the backdrop of European integration and integration into the international academic community, Ukraine is also actively engaging in the digital transformation of education. To strengthen the competitiveness of domestic higher education institutions, ensure the quality of educational services, and promote academic mobility and integration into the global scientific and educational space, it is crucial to develop an effective strategy for the digitalisation of higher education. Digital technologies serve not only as a means of optimising the educational process, but also as a key factor in the development of an innovative educational environment, digital culture and new models of interaction between all participants in the educational process (Hurzhii, Bakhmat, Zaichuk, 2021).

To summarise, the transformative processes of digitalisation in higher education are a complex, multidimensional phenomenon encompassing historical, technological, pedagogical, managerial and sociocultural aspects of the development of the modern educational landscape. Studying these processes is crucial for formulating effective strategies for the modernisation of higher education, the development of digital competences, and ensuring the competitiveness of higher education institutions in the context of a global digital society.

The aim of the study is to provide a theoretical and analytical understanding of the transformational processes of digitalisation in higher education within a historical context, to identify the characteristics of the evolution of digital technologies within the higher education system, and to justify the main directions of digital transformation in contemporary higher education institutions.

Main text. To achieve the stated objective, the following research tasks have been identified:

1. To analyse academic approaches to the interpretation of the concepts of ‘digitalisation’, ‘digital transformation’ and ‘digital learning environment’.

2. To examine the historical background to the emergence and development of digitalisation in higher education.

3. To describe the main stages in the evolution of digital processes within the higher education system: computerisation, internetisation and digital transformation.

4. To outline the prospects for the development of the digital learning environment in the context of contemporary global transformations.

Research materials and methods. The study employed a range of interrelated general and specialised research methods, which enabled a comprehensive analysis of the transformational processes of digitalisation in higher education from both historical and analytical perspectives. The theoretical and methodological framework of the study was based on historical, competence-based and systems-based scientific approaches.

Results and discussion. The concepts of ‘digitalisation’, ‘digital transformation’, ‘digital learning environment’ and ‘digital culture’ are currently the subject of active academic analysis within the fields of pedagogy, psychology, sociology, educational management and information sciences. Despite the variety of interpretations, researchers agree that digitalisation is a systemic process that changes not only the technical means of organising learning but also the very philosophy of education. The digital transformation of higher education encompasses the modernisation of learning content, the integration of innovative pedagogical technologies, the development of distance and blended learning, and the use of big data, cloud services, artificial intelligence and adaptive educational platforms (Kravchenko, 2020). In modern higher education institutions, digital technologies are being increasingly integrated into all areas of educational activity. The use of distance learning systems, electronic libraries, digital platforms, virtual laboratories, online communication services and digital assessment tools has become an integral part of the functioning of a modern higher education institution. Alongside the positive outcomes of digitalisation, such as the accessibility of education, the personalisation of learning, the development of academic mobility and the expansion of opportunities for international cooperation, a number of problems and challenges arise. Among these, particular

attention should be paid to issues such as inadequate digital infrastructure, unequal access to digital resources, the development of digital skills among those involved in the educational process, the protection of personal data, and the safeguarding of academic integrity and psychological well-being in the digital environment.

In its narrowest sense, digitalisation is primarily associated with the process of converting information, documents, services and individual work processes into digital format using information and communication technologies. In this context, digitalisation aims to automate operations, optimise data processing, increase the speed of access to information and improve communication mechanisms. This primarily involves the introduction of digital tools into existing organisational structures without fundamentally changing how they operate.

In contrast, the definition of 'digital transformation' is a much broader and more complex phenomenon, involving not only technological modernisation but also profound qualitative changes in management systems, organisational culture, interaction models and decision-making processes. Digital transformation encompasses a shift in the organisation's operational philosophy, a rethinking of management approaches, the modernisation of educational and professional practices, as well as the development of new digital competencies among those involved in the process (Kremen, Luhovyi, Saukh, 2021). Within the context of digital transformation, technology is not an end in itself, but a tool for systemic change that affects all levels of an organisation's operations.

The concept of 'digitalisation' has become one of the key terms in the context of the Fourth Industrial Revolution, or the 'Industry 4.0' concept, which is characterised by the integration of digital technologies into all spheres of public life. In general terms, digitalisation is defined as the process of converting various types of activities, services, information resources and communications into a digital format with the aim of improving efficiency, productivity and the accessibility of information (Kovalchuk, 2021). Digital technologies provide new opportunities for rapid data exchange, process automation, remote interaction and the creation of innovative models of work organisation and learning.

At the same time, contemporary research emphasises that digitalisation is not limited to the mere technical conversion of information into digital form. Its essence lies in the transformation of social, economic, educational and managerial processes under the influence of digital technologies. Digitalisation contributes to a change in the nature of interaction between people, organisations and information systems, shaping new models of communication, collaboration and access to knowledge.

The emergence of the concept of 'digitalisation' is directly linked to the processes of computerisation and globalisation of society. Whilst informatisation was primarily focused on the automation of individual processes and the introduction of computer technologies into professional activities, digitalisation encompasses a much broader spectrum of changes. It alters the very nature of interaction between participants in educational, social and professional environments, creating new digital ecosystems and networked forms of communication. A particularly important factor in the development of digitalisation has been the rapid growth of the internet and mobile technologies. It is the global accessibility of digital communications, the proliferation of smartphones, cloud services, social networks and online platforms that have enabled an unprecedented speed of information exchange and the integration of digital technologies into everyday life. In the field of higher education, this has facilitated the development of distance and blended learning, the emergence of digital libraries, virtual learning platforms, learning management systems and digital services for academic communication.

In Ukraine, the process of digitising higher education has gained significant momentum over the past decade. The Ministry of Education and Science of Ukraine and the Ministry of Digital Transformation of Ukraine have identified digital transformation as one of the priority areas of state education policy. This is evidenced by numerous legislative initiatives, concepts for the digital development of education, digital transformation programmes, and the introduction of electronic educational resources. At the same time, the implementation of digital transformation in higher education

institutions is often fragmented due to the lack of a systematic strategic approach, insufficient material and technical resources, and uneven levels of digital readiness among educational institutions.

The historical aspect of the development of digitalisation in education in Ukraine is closely linked to the development of the theoretical and methodological foundations of the informatisation of the educational and scientific sphere in the late 20th and early 21st centuries. Scientific works devoted to the formation of the digital infrastructure of education and pedagogical science in Ukraine are of great importance in the study of the transformational processes of digitalisation.

Particular attention should be paid to research into the organisational foundations for the development of digital resources, electronic libraries and information systems in the field of education. The late 1980s and early 21st century marked an important stage in the intensification of the informatisation of domestic education and science. It was during this period that the gradual introduction of computer technologies into the activities of educational institutions, the creation of the first electronic databases, automated information systems and digital bibliographic resources took place. Universities and research institutions began to actively utilise information and communication technologies for the collection, systematisation and dissemination of scientific information. Of particular significance was the development of digital pedagogical biographies, which became a key component in the formation of Ukraine's electronic scientific and educational space. During this period, there is a marked increase in scholars' interest in researching the history of Ukrainian pedagogical thought and the activities of prominent educators, scholars and educational figures. Historiographical research is beginning to be actively integrated into the digital environment, which facilitates the development of new forms of presenting and preserving scientific information. An important trend has been the creation of digital bibliographic resources, electronic archives and information platforms that provide access to academic works, biographical materials and historical-pedagogical sources. It is the digitisation of bibliographic resources that has paved the way for the creation of a modern digital learning environment and the development of open access to academic knowledge.

To gain a deeper understanding of the nature of contemporary transformational processes, it is important to trace the historical development of the concept of digitalisation within the context of the evolution of the information society. The initial stage of digital transformation is linked to the processes of computerisation that began in the second half of the 20th century. It was during this period that computer hardware and software began to be actively introduced into manufacturing, administrative and educational activities. Universities became important centres for the development of computing technologies, software creation and the training of specialists in the field of information technology.

The next stage in the development of digital processes was the rise of the internet, which gained momentum in the 1990s with the spread of the global internet and World Wide Web technology. The rise of the internet significantly changed the nature of educational activities, opening up opportunities for distance learning, electronic communication, online access to academic resources and international academic collaboration. During this period, the first distance learning programmes, e-courses, virtual libraries and online learning platforms emerged.

In the late 2000s, and particularly in the 2010s, the concept of 'digital transformation' became widely used in academic and administrative discourse. Unlike previous stages, digital transformation involves not only the introduction of technological tools, but also systemic changes to educational models, management mechanisms, forms of learning organisation and academic interaction. In this context, the digitalisation of higher education is viewed as a comprehensive process of modernising the educational environment, encompassing the integration of innovative pedagogical technologies, the use of artificial intelligence, big data, analytical systems, adaptive platforms and digital services to support the educational process.

An analysis of the historical development of digitalisation allows us to identify three main stages in the evolution of digital processes in the field of education: computerisation, internetisation and digital transformation. Each of these stages is characterised by specific technological and pedagogical

changes that have gradually altered the structure of the educational process and shaped a new digital culture within the academic environment.

Research by Ukrainian scholars, in particular the work of the H. Kostyuk Institute of Psychology of the National Academy of Pedagogical Sciences of Ukraine under the leadership of S. Maksymenko and M. Smulson, is of particular significance for the development of the theory of the digitalisation of education. Within the scope of the studies 'Current Issues in the Digitalisation of Ukrainian Education' and 'The Formation of Professional Subjectivity in Virtual Space', the researchers emphasise the need to create a global virtual educational space that will ensure an effective combination of face-to-face, distance and blended learning. The researchers emphasise that only a comprehensive digital transformation of education will enable the Ukrainian higher education system to keep pace with global trends and ensure the competitiveness of Ukrainian science and the economy at the international level.

In the context of the digitalisation of higher education, the digital transformation strategy for higher education institutions constitutes a comprehensive system of management decisions, organisational mechanisms and innovative approaches aimed at the effective implementation of digital technologies across all areas of a university's operations (Kovalchuk, 2021). This involves not merely the technical upgrading of the educational environment or the automation of individual processes, but the systematic modernisation of the educational, research, administrative and communication activities of higher education institutions in line with the contemporary global challenges of the digital society. The digitalisation strategy of a modern university must be based on a clearly defined mission and a strategic vision of the role of digital technologies in the development of higher education. It must encompass the definition of digital transformation goals, priority areas for modernising the educational process, the development of digital infrastructure, the formation of a digital culture within the academic environment, and the enhancement of digital competence among all participants in the educational process. An important component of such a strategy is also the integration of innovative pedagogical technologies, distance and blended learning systems, digital platforms, electronic resources, and services for academic interaction (Ivanenko, 2011).

In today's environment, a higher education institution's digital strategy must be closely aligned with the national policy on the digital transformation of education and take into account international trends in the development of the educational landscape. The effectiveness of digitalisation depends to a large extent on universities' ability to adapt to rapid technological changes, anticipate the needs of the labour market, and ensure the training of specialists who possess modern digital competences. This is precisely why a digitalisation strategy must be developed on the basis of a systematic analysis of the educational environment, an assessment of the institution's level of digital readiness, and consideration of the needs of all stakeholders. One of the key principles of effective digital transformation is that digital initiatives must align with the mission and values of the higher education institution. Digitalisation should not be viewed solely as a technical process of introducing new technologies.

Its primary objective should be to improve the quality of education, refine the educational process, promote research activities, and ensure the competitiveness of higher education institutions within the international academic community. All digital solutions must align with the institution's educational philosophy, promote academic integrity, foster student-centred learning, and help create an innovative educational environment. Equally important is the principle of flexibility and scalability in the digital strategy. In today's digital society, technologies are changing at an extremely rapid pace, and the volume of information is constantly growing. Consequently, the digitalisation strategy must allow for the rapid updating of digital resources, adaptation to new technological challenges, and the scaling of innovative projects. The flexibility of a digital strategy enables universities to respond effectively to changes in the external environment, implement new educational models, and ensure the continuous development of digital infrastructure. An important aspect of digital transformation

is the principle of inclusivity and the involvement of all participants in the educational process in the formulation and implementation of the digital strategy. Effective digitalisation is impossible without active collaboration between the institution's administration, lecturers, students, IT specialists, employers and other stakeholders.It is precisely this comprehensive approach to organising digital transformations that makes it possible to take into account the needs of different user groups, ensure the personalisation of the educational process, and create a supportive digital learning environment.

In the context of digitalisation, issues of data security and protection are becoming particularly important. The widespread use of digital platforms, electronic resources, cloud services and online communication systems is accompanied by an increased risk of breaches of data confidentiality, cyberattacks, personal data leaks and digital threats. This is precisely why the digital transformation strategy for higher education must provide for the creation of an effective cybersecurity system, the protection of information resources and the development of a digital culture of safe technology use.

In today's educational landscape, digitalisation must be focused primarily on improving the quality of education. Digital technologies should not only simplify access to learning materials or automate individual processes, but also ensure the improvement of teaching methods, the development of interactive forms of educational interaction, and an increase in student motivation and the effectiveness of teaching. The use of adaptive educational platforms, learning outcomes analytics systems, artificial intelligence and digital assessment tools creates new opportunities for personalising learning and shaping individual educational pathways. Furthermore, the digital transformation of higher education must go hand in hand with the development of a digital culture within the academic environment. This involves fostering digital literacy, information literacy, critical thinking skills, academic integrity and the responsible use of digital technologies. It is digital culture that ensures the effective functioning of the digital educational space and promotes the harmonious integration of technological innovations with the humanistic values of education.

Conclusion. In the course of their research, the authors analysed the transformational processes of digitalisation in higher education from historical and analytical perspectives. It has been established that the digitalisation of modern higher education is a complex, multi-level process encompassing technological, pedagogical, organisational and socio-cultural changes within the educational environment. It has been demonstrated that the development of digital technologies, the globalisation of the information space and the growing demands for the competitiveness of higher education institutions have become the main drivers of the digital transformation of the education system. The study traces the historical evolution of digitalisation from the stages of computerisation and internetisation to the current digital transformation, which involves the comprehensive implementation of digital technologies, artificial intelligence, cloud services and innovative educational platforms. It has been established that digitalisation is changing not only the technological tools of education but also the very philosophy of organising the educational process, shaping new models of learning, communication and academic interaction. It has been established that effective digital transformation of higher education requires a systematic strategic approach, the development of digital competence among participants in the educational process, the improvement of digital infrastructure and the assurance of information security.

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THEORY AND HISTORY OF CULTURE

DOI https://doi.org/10.30525/2592-8813-2026-2-28

PRESERVATION AND DIGITAL ARCHIVING OF AZERBAIJANI CARPET HERITAGE THROUGH ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS (IN THE CONTEXT OF LITERARY CARPETS)

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Abstract. This article examines the role of Electronic Document Management Systems (EDMS) in the preservation and transmission of Azerbaijani carpet heritage to future generations. Particular emphasis is placed on "literary carpets," namely carpets that incorporate elements of folklore, poetry, and symbolic textual motifs, which constitute the primary object of the study. The paper provides a comprehensive analysis of digitization processes, metadata structures, archiving methodologies, and the application of modern technologies. The findings indicate that EDMS play a significant role in both the physical and semantic preservation of carpet heritage. In addition, the study highlights the interactive capabilities of digital platforms. Through such platforms, users not only access information but are also able to conduct comparative analyses of the visual and textual features of carpets. This approach contributes to the wider dissemination of cultural heritage, enhances the effectiveness of scholarly research, and supports the preservation of national identity. Furthermore, cloud technologies and digital security mechanisms are evaluated as key factors ensuring the long-term storage and reliability of archival data.

Key words: Azerbaijani carpet weaving, digital archive, electronic document management systems, literary carpets, cultural heritage.

Introduction. Azerbaijani carpet weaving is considered one of the richest domains of world cultural heritage, encompassing both tangible and intangible elements. Carpets are not merely household items; they also serve as carriers of aesthetic, symbolic, and literary meaning. In particular, certain carpet specimens reflect poetic motifs, epic narratives, and elements of folklore, which allows them to be characterized as "literary carpets" (Azadi, 2018). The imagery depicted on these carpets often conveys specific stories, ideas, or philosophical concepts, thereby functioning as a bridge between visual art and literature. The choice of colors, compositional structure, and the arrangement of symbols serve as important indicators reflecting the aesthetic taste and cultural worldview of a given historical period.

At the same time, the structural diversity of carpet ornaments and their symmetrical composition demonstrate the continuity of national artistic traditions. Each motif carries not only an aesthetic function but also a specific semantic content, often linked to elements of collective memory. From this perspective, carpets function as an essential medium for the transmission of cultural codes. In particular, regionally distinctive ornamental styles reflect the local characteristics and richness of Azerbaijani carpet weaving.

In the modern era, the process of global digitalization opens new opportunities for the preservation of national heritage. Through Electronic Document Management Systems (EDMS), it becomes possible to systematically register, classify, and preserve carpet specimens. This approach ensures not only physical preservation but also the structured organization of information (Conway, 2010). Furthermore, digital databases enable the comparative analysis of carpet samples from different

regions, contributing significantly to the advancement of scholarly research and the international recognition of cultural heritage.

The application of digital technologies also facilitates the presentation of carpet heritage in new formats. Through virtual exhibitions, interactive platforms, and digital catalogs, users can engage more closely with these artistic artifacts. This not only ensures the preservation of carpet heritage but also promotes its wider dissemination and accessibility to broader audiences.

Literature Review. The issue of Azerbaijani carpet weaving and its preservation as a component of cultural heritage has been extensively examined by various scholars. Traditional approaches have primarily emphasized the semantic content of carpet ornaments, their regional characteristics, and stages of historical development. For instance, Kerimov (2013) systematically analyzed the typological features of Azerbaijani carpets and the origins of their ornaments, highlighting their close connection with cultural identity. Similarly, Azadi (2018) explained the symbolic and aesthetic functions of carpet motifs, noting that they carry both artistic and ideological meanings. These studies demonstrate that carpet ornaments are not merely decorative elements but also serve as expressions of social memory and collective identity.

In recent years, however, scholarly attention has increasingly shifted toward the application of digital technologies. Digital archiving and Electronic Document Management Systems (EDMS) are regarded as essential tools for the preservation of cultural heritage. Conway (2010) emphasizes that digitization is not only a means of data storage but also a strategic approach to ensuring long-term preservation. Hughes (2019) expands the concept of digital heritage by underscoring the importance of metadata and data standardization within this process. In addition, several studies highlight the impact of digital platforms on user experience and the possibilities of data visualization, which facilitate broader access to cultural heritage for diverse audiences.

Research conducted within the context of literary carpets remains relatively limited; however, existing studies indicate that carpets function not only as decorative artifacts but also as carriers of text and symbolic meaning. In his study on the management of digital collections, Sayre (2016) stresses the importance of multi-layered description for such objects. Furthermore, some contemporary approaches, particularly within the framework of semantic analysis and digital humanities, consider it possible to interpret carpet ornaments as textual entities. Overall, the existing body of literature suggests that the preservation of carpet heritage in the digital environment requires the integration of traditional approaches with modern technologies, offering broad prospects for future research in this field.

Discussion. The findings of the present study demonstrate that Electronic Document Management Systems (EDMS) serve as an essential and effective tool for the preservation and systematic management of Azerbaijani carpet heritage. In particular, for objects with multilayered semantic structures, such as literary carpets, digital archiving enables not only the preservation of their physical attributes but also their symbolic and semantic dimensions. This approach not only ensures the long-term safeguarding of cultural heritage but also creates extensive opportunities for its in-depth investigation across various scientific disciplines (Conway, 2010).

The semantic load of ornaments and motifs in literary carpets constitutes one of the central directions of research in this field. These carpets frequently incorporate elements that reference classical Azerbaijani poetry, epic narratives, and folklore traditions. For example, carpets inspired by the "Leyli and Majnun" motif symbolically express universal themes such as love and devotion. In this respect, they function not merely as decorative art objects but also as visual interpretations of literary texts (Kerimov & Rustamov, 2013). Such characteristics distinguish literary carpets from other types and make their study more complex and multidimensional.

The informative value of literary carpets lies in their role not only as aesthetic objects but also as carriers of historical and social information. The imagery depicted on these carpets reflects the social

relations, ideological perspectives, and cultural values of a particular period. From this perspective, their preservation in the digital environment can be understood not only as the safeguarding of artistic artifacts but also as the preservation of collective memory (Azadi, 2018).

Electronic Document Management Systems act as the primary technological platform in this process. EDMS are software systems designed for the collection, storage, and management of various types of data. Their main functions include data structuring, enrichment through metadata, provision of search and filtering capabilities, as well as the implementation of long-term storage and security mechanisms (Sayre, 2016). These features enable the systematic management and effective utilization of information in the field of carpet studies.

The implementation of EDMS in the carpet domain facilitates the creation of comprehensive and multi-layered databases for each carpet specimen. Such databases include detailed information such as the carpet's name, origin, weaving techniques, materials used, color palette, and the semantic interpretation of motifs. This, in turn, allows researchers to conduct comparative analyses based on various parameters and contributes to the generation of more profound scientific insights.

The process of digital archiving constitutes a core component of these systems and involves several stages. At the initial stage, high-quality digital images and 3D models of carpet specimens are created, ensuring the accurate recording of their visual characteristics. The subsequent stage involves the creation of metadata, which enriches each object with descriptive information. Metadata plays a crucial role in the identification, classification, and retrieval of objects within digital systems (Hughes, 2019).

During the classification stage, carpets are grouped according to criteria such as theme, region, technique, and stylistic features. This facilitates the systematic organization of data and enables more efficient analysis. At the final stage, the data are archived for long-term storage through servers and cloud technologies. This approach not only ensures data security but also guarantees accessibility at any time.

For literary carpets, an additional stage of semantic analysis is incorporated into this process. At this stage, the meanings of the symbols depicted on the carpets, their connections with literary sources, and their historical context are examined. This allows for not only visual but also text-based analysis of carpets, ensuring a more comprehensive understanding of their characteristics.

Semantic Interpretation and Visualization in the Digital Environment

The development of digital technologies is not limited to data storage; it also enables deeper levels of interpretation and visualization. These capabilities are particularly significant for objects with complex semantic structures, such as literary carpets. In this context, the way literary motifs are visually represented on carpets is illustrated in Figure 1.

Through digital visualization technologies, the structural composition of carpet ornaments can be presented with greater clarity. A detailed view of carpet patterns and their compositional features is illustrated in Figure 2. Such visual representations enable researchers to analyze the structure of ornaments in a more in-depth and comprehensive manner.

The development of digital technologies is not limited to data storage; it also enables deeper levels of interpretation and visualization. These capabilities are particularly significant for objects with complex semantic structures, such as literary carpets. In this regard, the ornaments and symbols depicted on carpets can be analyzed through various analytical tools available on digital platforms. This expands the possibilities of traditional research methods and facilitates the generation of new scientific insights.

Through digital visualization technologies, the structural composition of carpet ornaments can be presented with greater clarity. For example, high-resolution images and 3D models allow users to examine the detailed elements of carpets. This approach is especially valuable for achieving a more precise understanding of the narratives and motifs represented in literary carpets. In addition, digital platforms offer features such as interactive maps and timeline functions, which make it possible to trace the historical development and geographical distribution of carpets (Hughes, 2019).

Figure 1. Visual representation and symbolic expression of literary motifs (e.g., "Leyli and Majnun") in Azerbaijani carpet weaving

Figure 2. Structural composition of Azerbaijani carpet ornaments and a close-up view of pattern elements

The application of semantic analysis methods plays a crucial role in uncovering the layers of meaning embedded within carpets. In this process, the relationships between the symbols depicted on carpets and their corresponding literary sources are identified, enabling contextual interpretation. For instance, certain ornaments can be analyzed in relation to metaphors found in classical poetry. This makes it possible to study carpets not only as decorative objects but also as "visual texts." Such an approach is closely linked to the development of digital humanities and contributes to the emergence of new research directions in this field (Azadi, 2018).

On the other hand, the integration of data within the digital environment is of significant importance. Through Electronic Document Management Systems (EDMS), data obtained from various sources can be consolidated into a unified platform. This enables the analysis of carpet specimens

within a broader context. For instance, information about a particular carpet can be systematized based on its connections with literary sources, historical events, or specific geographical regions. Such integration enhances the complexity of research and contributes to the objectivity of the results (Conway, 2010).

The user-oriented design of digital platforms also plays a crucial role in this process. Through interactive interfaces, users can access and analyze information more efficiently. This increases the accessibility of carpet heritage not only for researchers but also for the general public. Thus, the digital environment functions not only as a database but also as an educational and awareness-raising platform.

At the same time, the application of artificial intelligence technologies opens new perspectives in this field. Through machine learning algorithms, the automatic recognition and classification of carpet ornaments become possible. This enables faster processing and analysis of large volumes of data. Such technologies may, in the future, contribute to a more systematic study and preservation of carpet heritage (Sayre, 2016).

The long-term preservation of data stored in digital environments also requires particular attention. For this purpose, it is essential to implement measures such as data backup, encryption, and security protocols. These measures prevent data loss and ensure the reliability of information. Especially for cultural heritage objects, such security practices are of strategic importance. The integration of digital technologies and EDMS creates new opportunities for the preservation and study of Azerbaijani carpet heritage. The presentation of the semantic and visual features of literary carpets within the digital environment facilitates their dissemination to a wider audience and their inclusion in academic discourse. This can be regarded as an important step toward the preservation and development of national cultural heritage. The application of Electronic Document Management Systems (EDMS) plays a crucial role in preventing the loss of cultural heritage. Considering the risk of physical carriers deteriorating or being destroyed over time, digital archiving emerges as an effective strategy for minimizing such risks. Since data stored in digital environments are protected through multiple backup systems, the likelihood of data loss is significantly reduced (Conway, 2010).

On the other hand, EDMS considerably enhance accessibility for researchers. Through digital platforms, scholars operating in different countries can access the same databases, which promotes the expansion of international scientific collaboration and the emergence of new research directions. As a result of applying multidisciplinary approaches, carpet heritage is studied within a broader context, strengthening integration across various scientific fields.

In the field of education, the implementation of EDMS improves the quality of the learning process. Digital platforms provide students with the opportunity to study carpet specimens interactively, thereby facilitating the integration of theoretical knowledge with practical application and enhancing overall learning effectiveness. The inclusion of literary carpets in the educational process supports the integration of disciplines such as literature, history, and art, and contributes to the development of students' comprehensive and critical thinking skills.

In the tourism sector, the application of digital archiving also creates new opportunities. Through virtual exhibitions and online catalogs, tourists can gain extensive knowledge about Azerbaijani carpet weaving. This contributes to the enhancement of the country's cultural tourism potential and its promotion at the international level. In particular, the presentation of literary carpets generates both aesthetic and intellectual interest among visitors.

At the same time, the implementation of EDMS is accompanied by certain challenges. The development of technical infrastructure, the execution of high-quality digitization processes, and the shortage of qualified specialists are among the primary issues in this field. In addition, the standardization of data and their alignment with international standards require additional resources and coordinated efforts.

The security of digital data and the protection of intellectual property rights constitute critical concerns in this field. When disseminating digital reproductions of carpet specimens, it is essential to define and safeguard their legal status. In this regard, the development and implementation of appropriate legal mechanisms are of paramount importance.

From a methodological perspective, the application of EDMS requires specific approaches. The accurate description of carpet specimens, their semantic interpretation, and contextual analysis represent key components of this process. This approach is particularly significant for literary carpets, as their layers of meaning can only be fully revealed through not only visual analysis but also consideration of literary and cultural contexts (Hughes, 2019).

In this respect, multidisciplinary collaboration is of special importance. The joint efforts of historians, philologists, art historians, and information technology specialists enable a more comprehensive and objective study of carpet heritage. Such an approach also facilitates the development of new research methodologies and the expansion of existing knowledge.

Electronic Document Management Systems open significant перспективes for the preservation and development of Azerbaijani carpet heritage. In particular, the presentation of literary carpets within the digital environment reveals new possibilities for interpretation and enhances the overall quality of research conducted in this field. In the future, the integration of these systems with artificial intelligence and other innovative technologies will enable the automatic recognition and analysis of carpet ornaments, thereby contributing to the achievement of new scientific advancements (Sayre, 2016).

The further advancement of Electronic Document Management Systems (EDMS) extends beyond the mere storage and structuring of existing data and directly influences the process of knowledge production. In this context, databases developed on digital platforms evolve from passive archival repositories into active research environments. Within such environments, users not only access information but also reinterpret it, conduct comparative analyses, and generate new findings. This approach is particularly valuable for objects with multilayered semantic structures, such as literary carpets, as it enables their examination across multiple levels of interpretation.

At the same time, methodologies emerging within the framework of digital humanities provide new perspectives for the study of carpet heritage. Through approaches such as text analysis, visual analytics, and network-based data analysis, the relationships between carpet ornaments and literary sources can be identified in a more systematic manner. This transforms research from a purely descriptive endeavor into an analytical one. As a result, carpet specimens are evaluated not only as cultural artifacts but also as complex carriers of information.

The standardization of data in the digital environment is another crucial aspect. Presenting data obtained from diverse sources in a unified format facilitates their integration and comparative analysis. For this purpose, the application of international metadata standards is essential. The standardization process requires not only technical alignment but also methodological consistency, enabling the comparability of research outcomes across different countries and strengthening global scientific collaboration.

Another important dimension is the optimization of user experience. Digital platforms with intuitive and functional interfaces ensure the efficient use of data. Interactive tools, filtering mechanisms, and visual presentation formats facilitate user interaction with information. This enhances the effectiveness of the learning process for both researchers and students. Particularly in visually oriented fields, such approaches accelerate knowledge acquisition and comprehension.

Furthermore, the continuous updating of data within the digital environment is a critical requirement. Since carpet heritage represents a dynamic field, new discoveries, research findings, and interpretations must be regularly incorporated into the system. This ensures the relevance of the database and enhances its scientific value. A dynamic data environment encourages researchers to adopt more flexible thinking and apply innovative approaches.

Digital transformation is not merely a technological shift but also a change in cultural perspective. This process not only preserves traditional knowledge but also enables its reinterpretation within new contexts. Consequently, through the application of Electronic Document Management Systems, Azerbaijani carpet heritage can be presented more broadly at both national and global levels and sustainably preserved for future generations.

Conclusion. The overall findings of the conducted research indicate that Electronic Document Management Systems (EDMS) constitute a strategically significant technological tool for the preservation and development of Azerbaijani carpet heritage. In particular, the storage of artworks with complex semantic and aesthetic structures, such as literary carpets, within digital environments ensures the transmission of both their physical and intangible values to future generations. In this regard, EDMS function not only as archiving tools but also as effective platforms for the systematization and reproduction of knowledge.

Within the framework of the study, it has been established that the process of digital archiving provides extensive opportunities for the multidimensional analysis of carpet specimens. In addition to their technical characteristics, the presentation of their semantic content in digital environments enhances the quality of scholarly research in this field. The correlation of motifs depicted in literary carpets with literary sources allows these artifacts to be evaluated not merely as decorative objects but also as products of visual-textual synthesis. This, in turn, stimulates the study of carpet heritage through more complex and multidisciplinary approaches.

At the same time, the application of digital technologies significantly expands the accessibility of carpet heritage. Through electronic platforms, researchers operating in different geographical locations can access the same databases, thereby fostering the development of international scientific collaboration. In this context, EDMS play a crucial role in shaping the global scientific communication environment. Furthermore, the digital environment facilitates the use of carpet heritage for educational and awareness-raising purposes, enabling the implementation of new pedagogical approaches in this field.

However, the research findings also reveal that the implementation of EDMS is accompanied by certain challenges. Insufficient technical infrastructure, a shortage of qualified specialists, and issues related to data standardization are among the main obstacles encountered in this domain. In addition, the security of digital data and the protection of intellectual property rights require particular attention. Addressing these challenges necessitates a comprehensive approach and the development of appropriate legal, technical, and methodological mechanisms.

In conclusion, the role of Electronic Document Management Systems in the preservation and study of Azerbaijani carpet heritage is undeniable. The further development of these systems and their integration with innovative technologies will, in the future, enable new possibilities such as the automatic recognition of carpet ornaments, the deepening of semantic analysis, and the more efficient management of digital heritage. Thus, EDMS emerge as one of the key instruments not only for preserving national cultural heritage but also for integrating it into the global scientific and cultural domain.

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DOI https://doi.org/10.30525/2592-8813-2026-2-29

AUDIOVISUAL STRATEGIES IN INTERACTIVE FMV PROJECTS FOR THE 3DO INTERACTIVE MULTIPLAYER PLATFORM

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Abstract. The article examines audiovisual strategies in interactive Full-Motion Video (FMV) projects developed for the 3DO Interactive Multiplayer plat-form. Based on a comparative analysis of twelve representative cases reproduced us-ing the Opera (libretro core) emulator, the study employs frame-by-frame video anal-ysis (Avidemux, FFmpeg) and authorial chronometry to investigate the interaction between cinematic language, interactive mechanics, and the console's hardware limitations.

Three archetypal strategies of audiovisual experience organization are identi-fied: action reflexivity, interactive drama, and spatial immersion. The type of interac-tivity determines the transformation of montage into an interface event, while sound design assumes a key navigational function. Hardware constraints (Cinepak codec and CD-ROM capacity) are interpreted as productive formative factors that generate the "digital patina" effect and aesthetic reduction.

The findings demonstrate that 3DO FMV projects form a coherent system of adapting traditional cinematic language to a digital interactive environment. Prospects for further research include a comparative analysis of FMV aesthetics on the 3DO platform and other 1990s multimedia systems.

Key words: interactive cinema, Full-Motion Video (FMV), 3DO Interactive Multiplayer, audiovisual strategies, interactive narrative.

Introduction. In contemporary art studies, interactive cinema continues to occupy a peripheral position within scholarly discourse. Positioned at the intersection of film studies and game studies, it has yet to receive adequate conceptual elaboration from either discipline. While film scholarship largely disregards interactive screen forms, researchers in game studies (such as M. Wolf (Wolf, 2008) and A. Järvinen (Järvinen, 2002), among others) tend to focus primarily on gameplay mechanics, often leaving the audiovisual dimension largely unexplored. Consequently, FMV projects are frequently regarded as a technical relic of the 1990s rather than as an autonomous artistic form in their own right. The absence of a systematic analytical toolkit makes it difficult to assess how traditional cinematic techniques – framing, editing, and sound design – are transformed under conditions of active recipient engagement. Moreover, the neglect of the aesthetic dimension fosters a reductionist view of interactive cinema as merely a transitional hybrid format. Accordingly, the aim of this article is to examine the patterns of audiovisual strategies in Full-Motion Video (FMV) projects developed for the 3DO Interactive Multiplayer platform through a comparative analysis of representative case studies.

Literature Review. Contemporary discourse on interactive cinema is gradually shifting from chronological description toward a structural typology of FMV forms. For understanding the context of the 3DO platform, the works of S. Kent (Kent, 2001) and C. Therrien (Therrien et al., 2019) are particularly important, as they examine the console from the perspectives of its technical architecture

and market strategy. From an economic standpoint, the issue has been analyzed by P. Zackariasson and T. Wilson (Zackariasson & Wilson, 2012), who explained the commercial failure of the platform. At the same time, the actual aesthetic strategies and distinctive audiovisual techniques developed by the creators of FMV projects remain largely outside the focus of scholarly attention.

Of particular relevance to the present study is the typology of design patterns proposed by C. Therrien, C. Poremba, and J.-C. Ray (Therrien et al., 2020). Their classification focuses predominantly on gameplay mechanics (navigation and resource management), while the audiovisual level – framing, editing, and sound design – remains on the periphery. A different approach is offered by K. Veale (Veale, 2012), who describes the "ontological tension" between cinematic imagery and ludic perception. This issue is further explored in contemporary examples by Y. Demirbaş (Demirbaş, 2021, pp. 215–216) and F. Jankowski (Jankowski, 2020, pp. 43–46, 52), who trace the roots of structural contradictions in modern interactive films back to the CD-ROM era.

Thus, the aforementioned studies tend to concentrate on narrative or socio-cultural aspects and do not provide a formalized analytical toolkit for examining audiovisual techniques operating within specific hardware constraints.

Materials and Methods. The methodological framework of the study is based on the integration of platform studies, film semiotics, and the theory of interactive narrative. This combination makes it possible to consider technology, imagery, and gameplay mechanics not in isolation but as interrelated elements of a single system. The research strategy rests on the understanding of hardware as an active agent of form-giving rather than a merely passive carrier. Building on the arguments of I. Bogost and N. Montfort (Bogost & Montfort, p.2–3, 6) concerning technical constraints as productive factors of creativity, the authors treat the hardware architecture of the 3DO as a full-fledged "co-author" of visual style.

The empirical basis of the study consists of twelve FMV projects selected according to the principle of theoretical representativeness. The corpus includes projects that cover key genre segments: interactive films, QTE-based action games, adventure titles, light-gun shooter games, and hybrid forms. These projects illustrate polar production strategies – from large-scale Hollywood-style productions to radically low-budget experiments. The selection process was completed at the point of theoretical saturation, when the inclusion of additional cases no longer revealed fundamentally new patterns of interaction between technical and aesthetic parameters.

Game sessions were reproduced using the Opera (libretro core) emulator – a modern fork of the 4DO/libfreedo core that ensures the highest possible fidelity to the hardware architecture of the 3DO Interactive Multiplayer console (Opera, n.d.). Frame-by-frame analysis of the video material was carried out with the help of Avidemux and FFmpeg, which allowed the detection of editing cuts, scene durations, and the synchronization of audio markers with frame-level precision. The temporal parameters presented in Tables 2–5 were obtained through the author's chronometry of emulated sessions, followed by verification of frame rates (15 or 24 fps, depending on the project). Game variables in branching narratives (levels of "trust", "morality", and final outcomes) were recorded through multiple playthroughs with the preservation of intermediate states and comparative reconstruction of dialogue trees.

The research corpus was deliberately limited to international (English- and European-language) releases that are available for emulation and documentary verification. Japanese-exclusive games for the 3DO Interactive Multiplayer platform, as well as erotic compilations from the Vivid Interactive series, were excluded from the sample due to the lack of official localization, limited access to gameplay data, and region-specific emulation characteristics that would require a separate specialized study.

Results and Discussion. The analysis of the visual layer is conducted through the lens of Christian Metz's film semiotics (Metz, 1974). The distinction between syntagmatic and paradigmatic relations makes it possible to register with precision the transformations of montage under the influ-

ence of interactive mechanics. The application of this analytical toolkit, in combination with David Bordwell's narratological framework (Bordwell, 1985; Bordwell, 1997), allows for the identification of specific ruptures between fabula and syuzhet that arise from the player's direct participation in the creation of the screen event. The theoretical conceptualization of the structure of interactive experience in the analyzed cases is grounded in Marie-Laure Ryan's theory of "possible worlds" (Ryan, 2001, p.99–105), according to which branching narrative trajectories appear as variable realizations of a shared fabular core. In turn, the differentiation of the recipient's degree of participation draws on Espen Aarseth's concept of ergodicity (Aarseth, 1997), which enables the classification of interaction types ranging from reflexive reaction to complex forms of cognitive interpretation.

The examination of spatial organization and the specificities of navigation in non-linear projects relies on Henry Jenkins's approach (Jenkins, 2004, p.121–123), which treats the game as a distinct form of narrative architecture in which meaning is reconstructed through the exploration of the environment. This perspective is supplemented by Lev Manovich's logic of the database (Manovich, 2001, p.194, 225), within which free navigation through an archive of video fragments is contrasted with the traditional fixed sequence of shots.

The functional analysis of the audiovisual sequence is based on Michel Chion's concept of the audiovisual contract (Chion, 1994) and Karen Collins's model of dynamic sound (Collins, 2008). Their combination makes it possible to distinguish the navigational, metacommunicative, and affective functions of sound design. Taking into account Alexander Galloway's definition of video games as an active medium (Galloway, 2006, p.2, 5), sound elements are understood as components of a cybernetic feedback loop that serves to confirm or correct the player's actions, thereby directly structuring the recipient's spatiotemporal experience.

To understand the visual specificity of the 3DO, it is necessary to recall the technical context of the years 1993–1996. Unlike arcade LaserDisc systems or the more limited Sega CD, the 3DO console was the first to enable full-motion video playback in the domestic environment without interruptions or compromises. This made sustained player immersion in the video stream possible (Therrien et al., 2019; Kent, 2001).

The material properties of the medium – above all, the Cinepak compression algorithm and the data transfer rate of the CD-ROM – prompted developers to fundamentally rethink traditional cinematic language. This rethinking ultimately found expression in a distinctive aesthetic of "digital primitivism" (Therrien et al., 2019). The console's open licensing model served as a catalyst for an unprecedented variety of content (Zackariasson & Wilson, 2012; Kent, 2001). As a result, within a single hardware environment, diametrically opposed approaches coexisted, ranging from large-scale imitations of Hollywood productions, such as Wing Commander III: Heart of the Tiger (1995), to radical manifestations of minimalism in Plumbers Don't Wear Ties (1994).

The reception of Full-Motion Video in the mid-1990s was marked by a pronounced ambivalence. While "showcase" releases for multimedia platforms appeared, the FMV format was constantly subjected to criticism for the player's limited agency and the reduction of gameplay to passive viewing or simple navigation (Ven, 2024, p.158, 160). In this context, the 3DO versions of such projects as Wing Commander III: Heart of the Tiger (1995) and Myst (1995) can be interpreted as examples of prestigious use of video material that legitimized cinematic presentation within the structure of the gaming experience.

By contrast, a significant portion of the FMV production of that period appears in critical and scholarly accounts as unable to properly structure the recipient's attention due to a lack of "rules of notice," which often provokes a mode of distrustful or suspicious viewing rather than engagement with expressive gameplay (Ven, 2024, p. 162–163). A particular culmination of this tension was the case of the 3DO version of Night Trap (1992), which became entrenched in public discourse as one of the key symbols of the debate surrounding "dangerous" game content – a debate directly linked to the U.S. congressional hearings and the rhetoric of moral panic (O'Holleran, 2010, p. 573, 608).

Ultimately, the FMV format was long perceived as a paradoxical medium that combined the technological promise of high image quality with accusations of cheap sensationalism and limited gameplay depth. As I. Van notes, this reputation partly explains the subsequent marginalization of the format and later attempts at its theoretical and practical rehabilitation through the development of specialized design patterns (Ven, 2024, p. 158–159).

In the analyzed projects, the games exhibit varying degrees of player agency. Some titles, such as Dragon's Lair (1994) and Brain Dead 13 (1995) tend toward a linear model: the storyline unfolds largely autonomously, and the player's role is reduced to timely reactions in moments of tension. Success or failure in an individual scene has no impact on the overall trajectory – the ending remains predetermined.

Other works, by contrast, construct branching narrative structures. In Psychic Detective (1995) this is achieved through multiple perspectives, while in Wing Commander III (1995) it emerges from the combination of dialogue choices with the outcomes of space combat, directly embodying the logic of "possible worlds" outlined by Marie-Laure Ryan (Ryan, 2001, p. 99–105, 248–249). An even more radical departure from cinematic linearity is demonstrated by projects that allow free spatial navigation. In Night Trap, events unfold simultaneously across different locations and are captured by a system of cameras, whereas in Myst the player reconstructs events that have already occurred by exploring static spaces – an experience that Henry Jenkins (Jenkins, 2004, p. 121, 128–129) aptly characterizes as "archaeological."

These differences are not merely formal. They are directly linked to the type of interactivity the game offers. Particularly illustrative in this regard is the reactive model embodied in Quick Time Events (QTE). This approach, widespread in arcade-style shooter games, requires the player to respond instantly to combinations of visual and auditory cues, focusing attention on critical narrative moments.

In Espen Aarseth's terminology (Aarseth, 1997, p.400-401), such an approach represents minimalist ergodicity, in which the player is required only to exert physical effort to actualize the text without the ability to influence its fundamental structure. By contrast, selective interactivity, characteristic of The Daedalus Encounter (1995), involves discrete decision points accompanied by a pause in the video stream and the appearance of a graphical interface. This allows for a clear distinction between modes of reception and interaction. In opposition to this, the exploratory interactivity of Myst is based on the principle of free movement without explicit instructions, which compels the recipient to engage in high cognitive activity in order to interpret the rules of the game world and formulate hypotheses about the logic of the environment.

Visual solutions in 3DO games range from static camera placement to full cinematic dynamism. In Myst (1995) and Night Trap (1992), space is constructed from fixed frames resembling living pictures (tableaux vivants): each location forms a self-contained composition that the player views from a single fixed point. Such stasis is often motivated by the internal logic of the game world – for instance, by surveillance cameras.

The opposite pole is represented by the cinematic dynamism of Wing Commander III (1995), whose creators actively employ classical film language, including panning shots, shot–reverse-shot sequences, and other techniques designed to elevate the interactive product to the status of a fully cinematic work. An intermediate position between these approaches is occupied by editing as an interactive boundary, where the moment of the cut itself becomes an interface element signalling a change in the mode of interaction.

Sound design in FMV games operates according to several established principles. In Night Trap, diegetic sounds (footsteps, door noises) serve as navigational cues in situations where events occur outside the camera's field of view. This corresponds to Michel Chion's principle of the audiovisual contract (Chion, 1994, p. 71, 85). In QTE-based games, by contrast, non-diegetic signals – artificial sounds that do not belong to the game world – perform an instructional function, alerting the player to the precise moment for pressing a button (Collins, 2008, p. 132).

At the same time, in high-budget projects featuring professional actors, vocal articulation acquires particular affective significance. Subtle intonations and precise lip-sync are employed to compensate for the limitations of gameplay mechanics through emotional persuasiveness of performance.

The technical constraints of the 3DO directly shaped the visual appearance of its games. The Cinepak compression algorithm produced characteristic artefacts such as pixelation and a limited colour palette. In low-budget titles such as Plumbers Don't Wear Ties (1994), these defects were left unmasked. In high-budget games, developers compensated for them through careful lighting and thoughtful scene composition, which helped divert attention from the technical shortcomings.

The size of the active frame is also directly related to the genre specificity of the projects: in action and shooter games, developers often deliberately reduced resolution in order to maintain dynamism, whereas narrative-oriented works tended toward greater visual detail. An additional dimension of this analytical axis is formed by peripheral devices – in particular the Gamegun light gun, whose physical act of aiming lends the interaction a distinctive bodily tangibility, blurring the boundary between spectatorial perception and direct experience (Galloway, 2006, p. 2–5, 25).

In certain cases, technical constraints were turned into a conscious artistic device. In Plumbers Don't Wear Ties, the slide-show format was employed: still images change abruptly, without smooth editing, while the soundtrack is simply overlaid. This approach does not mask the limitations of the medium but, on the contrary, accentuates them, creating an effect of rupture between sound and image that is unusual for classical cinema.

The results of the analysis of the entire corpus of projects provide grounds to assert that the analytical dimensions outlined above – primarily narrative, interactivity, and visual language – do not function in isolation but form stable structural configurations. At the same time, these strategies should not be regarded as a rigid classification, since the empirical material contains numerous intermediate and hybrid forms that testify to the conventionality and fluidity of the boundaries between such configurations. The combination of semiotic conventions and the hardware constraints of the 3DO platform leads to the formation of three principal strategies of audiovisual experience: actional reflexivity, interactive drama, and spatial immersion.

Table 1

Strategies of Audiovisual Experience in FMV Projects for the 3DO Interactive Multiplayer Platform

Configuration Parameter	Strategy I: Actional Reflexivity	Strategy II: Interactive Drama	Strategy III: Spatial Immersion
Dominant Logic	Reaction speed (rhythm synchronization)	Narrative choice (story management)	Navigation and analysis (meaning reconstruction)
Narrative Structure	Teleological discretization: linear chain of events; the player does not alter the story but only sustains its flow.	Networked multi-perspectivity: rhizomatic structure with alternative endings ("possible worlds").	Spatial / Archaeological: the story has already occurred; the player reconstructs it by exploring locations.
Type of Interactivity	Reactive (QTE): physical effort, reflexive response to stimuli.	Selective: pause for cognitive decision-making (ethical or tactical).	Exploratory: free movement, independent search for active zones.
Visual Strategy	Montage as signal: frame change marks success/failure. Often reduced visual quality for speed.	Cinematic imitation: shot / reverse shot, moving camera, high production value.	Tableau Vivant (static): fixed camera, emphasis on atmosphere and detail ("digital patina").
Function of Sound	Metacommunicative: interface signals, timing markers.	Affective / Dramatic: vocal performance, lip-sync, musical accompaniment.	Navigational / Diegetic: sound as spatial cue (stereo panning), ambient sound.
Representative Cases	*Dragon's Lair, Mad Dog McCree, Brain Dead 13*	*Wing Commander III, Psychic Detective, The Daedalus Encounter*	*Myst, Night Trap, Killing Time*

The proposed typology is heuristic in nature (Table 1). Certain projects, notably Killing Time (1995), The Horde (1994), and Brain Dead 13 (1995), exhibit intermediate or hybrid forms that combine elements of different strategies (for example, exploratory navigation with reactive QTE episodes). The identified configurations should be understood as dominant tendencies that enable the systematization of a wide range of observations, rather than as an exhaustive taxonomy. Thus, the first strategy (actional reflexivity) combines a linear plot with QTE mechanics. In Dragon's Lair (1994) and Mad Dog McCree (1994), editing ceases to function as an artistic device: the cut serves merely as a signal of the player's success or failure, effectively transforming cinema into an interface event.

Figure 1. Typical QTE sequence: the hero in a combat stance; editing functions as a binary signal of success or failure [9]

As the frame-by-frame analysis demonstrates, the presence of a strict reaction window of 18 frames (approximately 0.75 seconds) radically transforms classical cinematic grammar, turning editing into a utilitarian binary signal (Figure 1) that literally materializes the recipient's success or failure (Table 2).

Table 2

Frame-by-Frame Analysis of the QTE Sequence in the "The Drawbridge" Scene [9]

Phase	Visual Event	QTE / Action	Sound Signal	Type of Signal	Outcome
Preparation	Princess clings to the edge	Waiting (interval ≈ 0.75 s)	Heavy breathing + tense music	Metacommu-nicative	Readiness
Critical Window	Fall	UP (narrow reaction window)	Whistle + whoosh	Navigational	Success: rescue
Error	Late fall	Late / incorrect reaction	Splat + scream	Affective	Failure: restart
Resolution	Hero pulls the princess up	Automatic transition	Triumphant music	Affective	Transition to the next episode

A characteristic feature of this strategy is also the dominance of non-diegetic sound markers. Within this coordinate system, sound design assumes a metacommunicative role (Collins, 2008), as artificial sounds – such as a sharp whistle ("whoosh") or a dull impact ("splat") – function not as elements of the diegesis but as direct systemic imperatives and timing markers addressed to the player for immediate response. In addition, in order to maintain reaction speed, developers often sacrificed image resolution.

The second strategy, interactive drama, is characteristic of high-budget projects featuring professional actors, such as Wing Commander III (1995), Psychic Detective (1995), and The Daedalus Encounter (1995). Here, the game borrows shot contrast, camera movement, and acting from cinema

in order to legitimize itself as "real cinema." At the same time, the branching narrative enacts Marie-Laure Ryan's logic of "possible worlds" (Ryan, 2001): each choice opens a separate narrative branch.

Table 3

Step-by-Step Analysis of the Dialogue Tree in the "Briefing with Hobbes" Scene (Wing Commander III, 1995)

Stage	Player's Line (Choice)	NPC Reaction	Variables Affected	Outcome
1. Greeting	"How are you holding up?"	Positive response; trust increases	Trust ↑ (moderate)	Positive tone established
2. Critical Choice	A) "We need you more than ever" B) "I still don't trust you"	A) Loyalty B) Alienation	A) Trust ↑↑, Morale ↑ B) Trust ↓, risk of losing an ally	A) Better ending B) More difficult ending
3. Conclusion	"See you in the fight"	Transition to combat mission with modified crew state	Morale depends on dialogue branch	Depends on accumulated choices

The frame-by-frame analysis presented above (Table 3) demonstrates that the involvement of actors (Figure 2) and the appropriation of classical cinematic grammar serve as a powerful instrument for legitimizing an FMV project as a fully-fledged cinematic work.

Figure 2. Live-action scene of a typical interactive dialogue with branching narrative aboard the ship Victory in Wing Commander III (1995)

At the same time, the decision-making logic hidden from the recipient reveals a profound realization of "networked multi-perspectivity" (Ryan, 2001), since a single dialogue choice can simultaneously modify three independent variables: the level of trust, the global ending, and the current morale of the crew. Particularly innovative for the 3DO platform is the strategy of directly translating the consequences of this dialogue into the procedural simulation of space combat, which effectively overcomes the characteristic gap between video inserts and gameplay typical of the period.

The third strategy, spatial immersion, is characteristic of Myst (1995), Night Trap (1992), and Killing Time (1995). Here, the player explores space through trial and error, while time unfolds in a non-linear or simultaneous manner (as in Night Trap, where events occur in parallel across different rooms). Since the camera is static, the sounds of the world (footsteps, water noises, music) become the primary navigational cues (Table 4).

Structural analysis of the corresponding scenes reveals the specificity of spatial immersion, where the continuous flow of real time fundamentally distinguishes this experience from pre-recorded QTE sequences.

Table 4

Logic of the Camera Matrix in the "Bathroom Trap" Scene (Night Trap, 1992).

Stage	Camera	Event in Frame	Player Action	Reaction Time	Outcome
1	Living Room	Girl enters the bathroom	Switch to Bathroom	≈ 2 s	Readiness
2	Bathroom	Intruder appears in the doorway	Waiting (first frame of threat)	≈ 2 s	Readiness
3	Bathroom	Intruder enters the "red zone"	Trap activation	≈ 0.4 s	+1 captured
4	Bathroom	Intruder attacks	Late activation / wrong camera	–	Failure

Since the static camera limits visual control over the locations, diegetic sound – such as the footsteps of intruders or the sound of water – assumes the primary navigational function [6], forcing the player to orient themselves in space through auditory cues.

Figure 3. Living room scene with full interface (camera matrix, timer, and "captured" counter), Night Trap (1992)

A distinctive visual trigger for action is the appearance of an enemy in the "red zone" (Figure 3), which requires not merely reflexive speed but also prior spatial planning and synchronization of actions with the logic of parallel real-time editing (Table 5).

Table 5

Step-by-Step Analysis of Location Exploration in the "Library / Clock Tower" Scene, Myst (1995)

Step	Player Action	Visual / Audio Detail	Duration (Approximate)	Narrative Progress
1	360° room inspection	Books, dim lighting, "digital patina", wind noise	20–60 s (individual)	Hypothesis about hidden information
2	Click on the book "The Age"	Opening animation + voice-over (Sirrus)	5–15 s (individual)	+1 diary fragment
3	Symbol comparison	Wall symbols match the drawing in the book	30–90 s (individual)	Puzzle solved → transition

The timings presented are approximate and depend significantly on the player's individual trajectory of exploration and the speed of cognitive processing of visual cues.

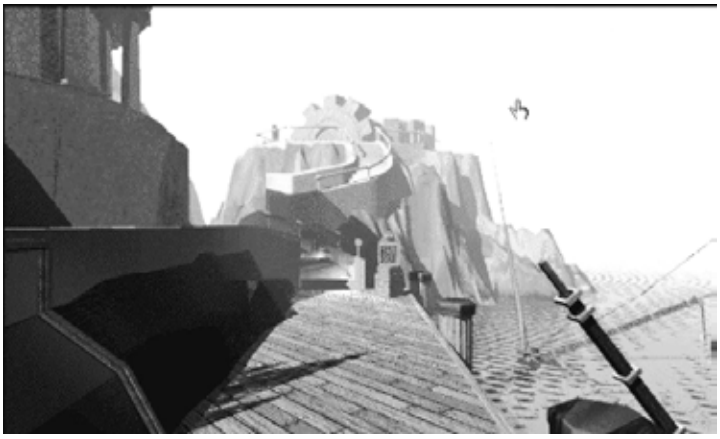

Figure 4. Typical static location with "digital patina": Cinepak compression artefacts as an artistic element in Myst (1995)

As the step-by-step analysis of the locations demonstrates (Figure 4), the aesthetics of spatial immersion are inseparable from the technological specificity of the medium. The so-called "digital patina" – encompassing Cinepak compression artefacts, general pixelation, and colour reduction – is not concealed by the developers but is organically integrated into the visual style, enhancing the atmosphere of antiquity and mystery (Therrien et al., 2019).

In this emphatically static world, the player effectively assumes the role of a media archaeologist, while the narrative is reconstructed purely retrospectively through attentive observation of details and deciphering of texts. Given the fundamental absence of explicit instructions, physical interaction gives way to high cognitive activity, such as hypothesis-building or the comparison of visual symbols. In accordance with the concept of ergodic literature (Aarseth, 1997), this approach represents a maximal level of engagement, in which the meaning of space is constructed through the intellectual efforts of the subject.

Particular scholarly attention is required by the phenomenon of aesthetic reduction observed in the analysis of marginal projects. Cases such as Plumbers Don't Wear Ties (1994) and the Vivid Interactive series (1995) demonstrate that technical and economic scarcity can paradoxically serve as a powerful source of form-giving. A radical rejection of movement, as in the slide-show format, or the reduction of interactivity to the level of a media player menu, outlines a kind of "zero degree" of cinematographic quality. At the same time, unsuccessful hybrid experiments, represented by The Horde (1994), highlight the structural limits of combining fixed video material with procedural simulation, clearly demonstrating the ontological conflict between the determinism of video recording and the flexibility of game code, which delineates the external boundaries of the platform's audiovisual potential.

Conclusions. The FMV projects developed for the 3DO Interactive Multiplayer platform do not constitute a chaotic collection of technological experiments but rather a coherent system of audiovisual solutions, in which every element – from compression algorithms to the logic of dialogue branching – acquires formative significance. A comparative analysis of the project corpus demonstrates that the type of player interaction directly determines the structure of cinematic language. In the mode of actional reflexivity, editing is reduced to a binary interface signal, while sound assumes a metacommunicative function. Interactive drama legitimizes the format through the use of shot contrast and expressive vocal articulation, although the hidden system of variables reveals the fundamental incompatibility of linear editing with the logic of "possible worlds." Spatial immersion, by contrast,

is based on static framing according to the principle of the tableau vivant, in which diegetic sound becomes the primary navigational tool and the narrative is reconstructed retrospectively through cognitive ergodicity.

Thus, the key regularity lies in the inseparable connection between the type of interactivity and audiovisual organization: each strategy generates its own grammar of framing, editing, and sound design. The hardware constraints of the platform function as active factors of form-giving – from the effect of "digital patina" to radical minimalism in low-budget projects. At the same time, comparative analysis has revealed the structural limits of hybridization: the combination of fixed video material with procedural simulation demonstrates an ontological conflict between the determinism of recorded footage and the flexibility of game code. In this context, the 3DO Interactive Multiplayer platform emerges as a kind of historical laboratory of transitional media forms, whose artistic techniques laid the foundations for the contemporary grammar of interactive cinema and testified to the capacity of interactivity to generate fundamentally new forms of receptive engagement.

Future research should be directed toward a comparative analysis of the FMV aesthetics of the 3DO Interactive Multiplayer with parallel corpora from the Sega CD and arcade LaserDisc systems, as well as toward verifying the proposed typology in relation to contemporary interactive films, where "digital patina" gives way to high resolution, yet the logic of "possible worlds" retains its relevance.

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THEORY AND INNOVATIONS OF SOCIOLOGY

DOI https://doi.org/10.30525/2592-8813-2026-2-30

THE IMPACT OF CLIMATE CHANGE ON SOCIAL STRUCTURE AND SOCIAL EQUALITY

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Abstract. Climate change, along with environmental degradation, global inequality and global security issues, is among the four most significant problems of the 21st century. For this reason, it has a decisive position in shaping the continuity of natural life and determining the future of people, at least as much as economic crises, military conflicts, cyber wars and nuclear threats. It is easily seen through its short-term effects that climate change will cause irreparable damage to life on earth in the long term. These short-term effects include loss of life, environmental stress, negative economic effects, water and food crises, social and geopolitical tensions. This study focuses on addressing climate change, which represents the transformation in the society-environment relationship, in the context of environmental sociology. It is aimed to reveal the typical reflection of the changing values and worldview of industrial societies on nature, the relationship of this perception with climate change and the formation of climate change action plans around this perception. The phenomenon of climate change is important in terms of showing the differentiation of the society-environment relationship.

Key words: climate change, global impact, social structure, social policy, resilience.

Introduction. The vast majority of climate researchers accept that the risks of climate change are real and that if efforts to combat them fail or are delayed, greenhouse gases in the atmosphere will increase (Coach, 2012: 2). Greenhouse gases cause environmental degradation that threatens human life and the necessities of life. In this sense, climate change is a long-term, uncertain, and welfare-threatening global and intergenerational social problem. In this sense, it can be defined as a new social problem that is both similar and different from traditional social problems (Gawde et al., 2016: 768–771). Similarly, it has the potential to deeply affect economically, socially and environmentally unequal societies. Therefore, the fight against climate change needs to be structured on the basis of the integration of economic, social and environmental goals and social justice. However, the focal point of the fight against climate change has not yet been determined. Various discussions are being carried out, especially on the approach, and the fight against climate change is being structured with many approaches such as sustainability, energy efficiency and carbon trade (Bates, 2002: 465). However, two approaches other than these approaches are particularly noteworthy. The first of these, social policy, has an important history and aims to ensure social justice for each social group through social arrangements under the actorship of the state. Undoubtedly, these arrangements include safety nets and guarantees regarding the reduction of economic, social and cultural inequalities, the provision of equal opportunities and, ultimately, aim to establish social justice and peace (Gülmez, 2008). Another approach, resilience, generally aims to develop the power and capabilities of resistance in the face of events that shake the dynamics of society's resistance, such as a disaster. Social structure is addressed at personal, social, ecosystemic, urban, etc. levels and is organized through individual and social ini-

tiatives. In this context, environmental sustainability for the ecosystem, infrastructural strengthening for a city; It refers to the psychological and economic endurance ability of individuals and society (Cameron, 2011).

The aim of this study is to conduct a discussion emphasizing the place and importance of social justice in the construction of the fight against climate change by addressing social policy and resilience. The fight against climate change has a structure that includes urgency for the solution of many vital social, economic and environmental problems and should be addressed within the framework of a certain principle for national integrity and social benefit. In this context, the most important output of the study is to close the cognitive gap regarding the need for a new approach by discussing the content of the two approaches with the assumption that the most important and necessary principle is social justice.

Literature Review. Casty et al. (2007) applied a survey they developed on global climate change to randomly selected adults in the United States by phone between July 13 and August 10, 2004. In the regression model used in this study, the dependent variable was the risk perception regarding climate change, while the explanatory variables were the knowledge level and personal activities of American citizens. In addition, the participants' trust in scientists was also investigated in this study. The study results showed that the knowledge level, trust in scientists and personal activities were related to each other and that these had an important place in global warming and global climate change. It was determined from the study that participants with a high knowledge level and trust in scientists felt less responsible and less anxious about global warming.

Wise et al (2014) investigated the perceptions of 91 seventh grade students from 3 different schools in the central United States regarding global warming and climate change using qualitative data collection methods. In the study, students responded to the questions by writing and drawing. Then, content analysis was performed by inductively defining the concepts in the students' answers and descriptive statistics were used. The aim here was not to investigate the factors affecting the students' answers but to investigate their perceptions regarding global warming and global climate change. Based on the findings, the study made curriculum recommendations to provide students with more information about global warming, climate change and environmental health in general and to improve NRC (National Science Education Standards) educational standards.

Coach (2012) developed an eight-page survey covering environmental concern, awareness and knowledge of climate change and global warming, attitudes towards climate change and global warming, and behaviours related to climate change and global warming using semi-structured qualitative interviews with residents of the south of England. 1,771 surveys were distributed to six areas in and around Portsmouth (a city on the south coast of England) selected by stratified random sampling in September and October 2003. To examine whether different concepts (global warming or climate change) influenced responses, half of the sample were given a climate change survey and the other half were given a global warming survey. Of the 1,771 surveys distributed by post, 589 were returned. Of the surveys returned, 277 (47 per cent) were the “climate change” survey and 312 (53 per cent) were the global warming survey. Qualitative research data were imported into NVivo and coded using a hierarchical coding procedure. SPSS was used to produce descriptive and frequency statistics for all variables (including coded qualitative data) and to perform the chi-square test. The aim here was to determine whether there were significant differences between the two surveys. While the findings from this survey were generally consistent with findings from previous studies on public understanding of climate change/global warming, when examined in context, significant differences were seen in how key terms were understood. The results showed that awareness, impact and knowledge varied significantly across concepts. Similar to previous surveys (Nordhaus, 2018), it was concluded that respondents were more aware of global warming than climate change. Global warming is thought to be caused by humans and is thought to be linked to temperature increase, ozone layer depletion due

to melting icebergs and glaciers, the greenhouse effect and temperature-related effects. Participants associated climate change with natural causes. In addition, the results showed that participants thought that global warming was much more concerning than climate change and that global warming was more important than climate change. Finally, participants took individual or public actions for global warming rather than climate change; they thought that planting a large number of trees could prevent climate change and mitigate global warming.

Stehr et al. (2005) examined the relationships between perceptions of climate change and nuclear energy and their perspectives on other energy sources. In their study, they used the results of a survey conducted by IpsosMORI to 1,491 people aged 15 and over, selected through quota sampling. Participants were interviewed in their homes at 257 sampling points in England, Wales and Scotland between 1 October and 6 November 2005. ANOVA and t-test were used in the analysis of the data. Stehr et al. (2005) proposed three different SEMs to show how concerns about climate change and the environment affect perception factors related to nuclear energy and renewable energy. In the study, it was determined that participants' concerns about the environment and climate change positively affected their perspectives on renewable energy sources and negatively affected their perspectives on nuclear energy sources.

Wang and Guiling (2015) obtained the data in their study from the annual "environment" survey conducted by the Gallup (http://www.gallup.com/home.aspx) Organization. They used multivariate statistical analysis in the analysis of the data. According to the findings, in general, Liberals and Democrats express more concerns about global warming than Conservatives and Republicans.

Results. Climate change is characterized by different and unequal social impacts. Accordingly, it is thought that the impact will intensify according to personal, environmental, social and economic inequalities and cause inequalities to deepen. At the same time, the nature and severity of climate change impacts vary significantly in the context of regions, countries or geographies. Indeed, it is the case that agricultural workers and office workers are exposed to different impacts for the same reasons. However, when two regions are compared due to their socio-economic characteristics (for example: agricultural and industrial regions), it is expected that the reasons and severity of the impact will not be the same. In this sense, climate change is a new social problem that societies, economies and geographies face. The United Nations Framework Convention on Climate Change defines climate change as "a change in climate resulting from human activities that directly or indirectly disrupt the composition of the global atmosphere, in addition to the natural climate variability observed over comparable time periods" (UN, 1992). The increase in natural disasters, especially floods and droughts, due to climate change threatens human health. According to a report by the World Health Organization, more than 250,000 deaths are estimated to occur worldwide each year due to climate change. This is particularly true for vector-borne diseases such as malaria and dengue fever. In 2015, a record-breaking heat wave in Japan killed 1,200 people. This is one of the significant impacts of climate change. Natural disasters and floods are increasingly forcing people to flee their homes. According to the UN High Commissioner for Refugees, 25 million people were displaced in 2019 due to climate change. This brings the concept of "climate refugees" to the fore. A 2018 World Bank report also estimated that up to 140 million people will be displaced by climate change by 2050.

Inequality and human rights violations in societies are exacerbated by the impacts of climate change. Especially in developing countries, economically and socially vulnerable groups are more likely to suffer from natural disasters. For example, in the adoption of the UN Sustainable Development Goals in 2015, one of the main priorities was to consider climate change together with the fight against poverty and social justice. Among these goals, taking measures to increase the resilience of poor societies to climate change is also important. Research shows that among people affected by natural disasters, women, children, ethnic minorities and people with disabilities are at greater risk and definitely need additional support to rebuild their lives.

Using the example of Azerbaijan, we examined the experience of developing countries in this regard and how climate change affects social structure. It turned out that climate change also brings with it certain problems, and these problems also encourage migration trends. The following diagram shows these problems in the appropriate order with percentage indicators. Statistical indicators are obtained from the reports of the State Statistics Committee.

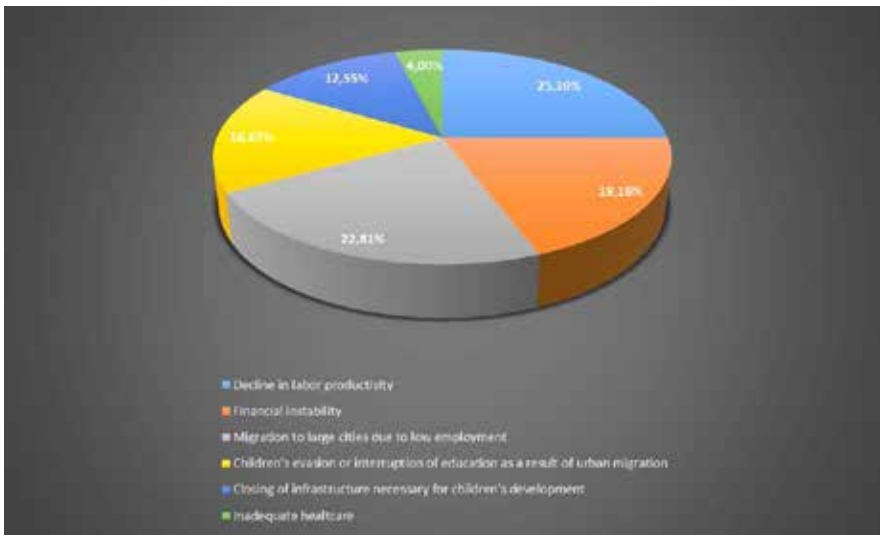

Figure 1. The Social and Economic Effects of Climate Change in Azerbaijan

Source: State Statistical Committee of the Republic of Azerbaijan, 2024

Climate change involves social and economic challenges due to its real and tangible effects on precipitation, temperature, seasonal timing, biodiversity and the status of ecosystem services. Current and potential effects can be summarized as land loss, loss or inefficiency of ecosystem services, migrations, deterioration of health, economic transformations and social conflicts Indeed, the social problems and inequalities caused by the effects and consequences of climate change are determined as two important elements and are examined in this section. The social problems resulting from climate change are largely complex and are both similar and very different from traditional social problems. The similar aspects of climate change with traditional social problems are encountered in the frameworks related to emergence, impact and struggle. In this sense, like traditional problems, climate change is also related to industrialization, urbanization and democratization. In addition, both of them create social conflicts in the distribution of blessings and burdens. Finally, it is possible to struggle under significant economic and political constraints.

Discussion. Accordingly, climate change is global in nature, involves long-term economic and social risks and is considered the most difficult collective problem in human history due to the distributional difficulties it brings among countries, people and generations (Connolly, 2021: 16). When we consider the social effects and consequences of climate change in the context of social impacts and consequences, it is not expected that every region, country or social group will experience equal damage. The reason for this situation can be shown as two elements of climate change that need to be underlined. (Hanna et al., 2016: 117). The most important feature that causes us to see climate change as a new social problem is related to uncertainty. Accordingly, the impact of climate change is less predictable than the impact of other social problems. In other words, while the vulnerabilities of traditional social problems such as unemployment or poverty are directly visible, the problems related to climate change are widespread, indirect and have a largely longer time horizon. Climate change-related risks have been defined as direct and indirect. (Turkesh, 2000: 17). The visible effects of climate

change on ecosystem services and weather directly affect health, employment, housing and economic well-being and therefore the related welfare programs. (Craig, 2002). However, indirect risks are caused by climate change policies that attempt to shift the costs onto society in order to suppress the need for public intervention. The most well-known example is the oft-debated carbon tax that is deemed necessary to combat climate change. In a situation where the entire cost is shifted onto society, it is possible that the most vulnerable segments of society will be adversely affected (Gough et al. 2008: 334). In this sense, while uncertain and unpredictable risks are a serious socio-economic cost item in both cases, the fact that the struggle also involves significant costs and is generally imposed on the most vulnerable segments within social groups raises concerns about social justice (Barker, 2008: 318). Thus, it is necessary not to keep climate change separate from other social problems, but to define it as including all social problems and being prepared for new risks, and to structure the struggle sensitively and to move away from a framework that will create new social problems.

The consequences of climate change, although varying in severity, will affect every individual in society. Accordingly, the most important effects and consequences are expected to be seen on housing, health, employment and income. The social effects of climate change occur due to unbalanced forms of social vulnerability. In this sense, it is affected by the status of personal, environmental and social factors. Personal factors are individual characteristics such as disability, gender or age. Environmental factors are the status of the housing in which people live, the status of the environment, geographical features and individual relationships with the environment. Social factors include aspects such as the strength of people's social networks and income levels. These factors determine the extent to which climate change will affect the well-being of society (Alpan, 2014). Among personal factors, gender is subject to significant inequalities regardless of climate change. This situation is expected to deepen with climate change and women are expected to be affected more than men. Women are more disadvantaged than men in terms of gender-related social and economic roles and responsibilities, their positions in the labor market, education, use of technology and social protection. In this context, women's current situation includes many inequalities and causes them to be more vulnerable to environmental disasters. For example, women are intensively employed in sectors directly dependent on ecosystem services such as agriculture. The loss of jobs in the agricultural sector will cause women to become unemployed and poor. It is also seen that women are already excluded from new jobs that will be created in construction, manufacturing and engineering, where they are relatively unemployed (ILO, 2018: 12). Age and disability also create inequalities similar to gender. Elderly or disabled individuals are among the social groups that will be most affected by disasters and extreme weather events caused by climate change. When they encounter such effects, their physical conditions may not be suitable for surviving the disaster they experience. At the same time, since they are more prone to extreme temperatures, air pollution and chronic diseases, they are more quickly and easily affected by climate change. Elderly individuals, in particular, are at greater risk of exposure to heat stress due to the decrease in their capacity to dissipate heat through skin blood flow and sweating. This situation shows that physical inequalities will include more disadvantages with climate change, and their problems in coping with disasters and health will increase (ILO, 2018: 23-24). However, they are also expected to have problems especially in accessing wage income that will provide them with a living. In the current situation, elderly or disabled individuals cannot easily find a job in the labor market or change their profession. In addition, especially elderly individuals cannot easily acquire new skills compared to young people. In this case, it becomes possible for them to be negatively affected by the occupational transformation brought about by climate change and to experience severe poverty. Prejudices against the elderly and disabled may arise from society or the dynamics of the labor market itself, as well as from the lack of educational programs specific to them, and this situation deepens their economic disadvantages even more when the effects of climate change become intense (ILO, 2018: 25). Age-related disadvantages will also affect children.

The fight against climate change is a controversial issue on a global scale. It is stated that a fight in an environmental context would be insufficient; it is necessary to go beyond the technical dimension to address its social, economic and political consequences. Accordingly, in an intervention approach devoid of the principle of social justice, a tendency is observed to transfer the responsibility for combating climate change to individuals. Thus, a political approach in which individuals are responsible for combating climate change carries the danger of producing policies by ignoring existing forms of inequality. However, in a rights-based understanding of justice, pre-existing inequalities and how they affect them are accepted much more clearly, awareness of disadvantages is developed and the fight against climate change is organized with this understanding. However, there is no consensus on the way and method of combating climate change. Various discussions are being carried out, especially on the approach, and the fight against climate change is being designed with many approaches such as sustainability, energy efficiency, carbon trading (Beg et al., 2002: 129). However, a common understanding is needed for the solution of a vital and socially structured global problem such as climate change. Under this heading, two of these understandings will be examined and discussed in the context of social justice.

The emergence of the concept of social policy coincides with the self-regulation of the market economy with laissez-faire capitalism in the 19th century. Social programs such as public health, education, labor law and social insurance emerged with the aim of protecting social justice and peace in the face of new risks and insecurities in the labor market, pressures from unions, social democratic and communist parties and civil movements. However, the institutionalization of many of these programs can be seen since the Second World War (Gough, 2018: 109). After the Second World War, with the increase in welfare state practices, the social state became effective and the content of social policy expanded. Thus, social policy became practices targeting the aim of social justice by encompassing the entire society. In this sense, the tools first developed for similar needs of large crowds were transformed and applied for differentiated needs. Therefore, over time, social policy evolved from practices targeting the workforce in the narrow sense to social policies shaped on the basis of social justice. The broad definition of social policy is as follows: "a science of balance, harmony and peace that aims at social justice, that foresees and creates measures and policies to correct the impartial laws of economics and to eliminate the causes of class struggles within the capitalist social order" (Coach, 2012: 19). Another definition is as follows: "an interdisciplinary science of social justice that examines the policies that should be followed in order to protect individuals and segments that are economically, socially, culturally and otherwise weak, to reduce social injustice and inequalities created and deepened by the laws of the market economy, as well as the measures that should be taken and taken with unilateral and bilateral means, the legal regulations that should be made and made and the variables" (Gulmez, 2008: 3). Climate change deepens social problems such as poverty, inequality and instability, and this impasse is caused by a wide range of effects. However, the wide range of social policy is suitable for covering the wide range of effects of climate change.

Ultimately, while climate change is devastating to humans economically, socially and environmentally, social policy exists to protect humans from destruction or to eliminate traces of destruction. In this sense, the mitigation (energy, transportation, forest, trade, etc.) and adaptation (education, health, housing, social security, employment, etc.) policies and programs needed to combat climate change are the main focus of social policy. In particular, existing social protection tools formed with a holistic and social perspective are the most fundamental point of climate change adaptation policies. The scope and public function of social security are the guarantee of protection regardless of gender, age, class, religion, race or ethnicity. Indeed, integrating the effects and consequences of climate change into social protection policies and programs is defined as the most important task for governments in both combating climate change and creating social policies. Social policy makes a difference in two important aspects compared to other approaches in structuring the fight against climate change.

Firstly, social policy has a long history of experience with localized applications for traditional social problems, global discourses and policies based on scientific data. It is possible to say that this experience is needed, especially considering the uncertain effects and consequences of climate change (Caney, 2010: 72). In this way, the first intervention to the socio-economic conditions and basic needs that are expected to be directly affected by increasing temperatures can be guaranteed (Gough, 2008: 328-329). Secondly, the state is the main actor in social policy. Social policy is an important step in reducing poverty, risks and vulnerability, and continues to protect it with the communication environment it creates, and it also includes real persons and institutions that can be held accountable (ILO, 2021: 135–138). In the fight against climate change, where the state is the main actor, a management approach that includes all stakeholders and all institutions becomes possible. Thus, the existence of an active state where rights are determined, protected and fully utilized will ensure that social policies are created for the most vulnerable individuals and will establish a fair distribution (Gough et al., 2008: 327). One of the most important discussion topics in combating climate change is how resources should be distributed among current and future social risks (Stehr, 2005). In this sense, social policies provide fair distribution by reducing the connection between the living standards of the most vulnerable social groups and their incomes due to work to some extent. However, it is possible to minimize the economic, social and cultural transformation costs necessitated by climate change through social policies. In this way, environmental, social and economic transformation and global integration will be less costly and less time-consuming than expected (Gough et al., 2018: 328).

Situation in Azerbaijan. Azerbaijan is taking the fight against the impacts of climate change seriously. The declaration of 2024 as the "Year of Solidarity for a Green World" is an important step towards our country's progress towards environmental protection and sustainable development. With this initiative, Azerbaijan aims to increase environmental education in its territory, expand methods of combating climate change, and ensure environmental protection. Azerbaijan's hosting of COP29 will also contribute to the adoption of important decisions at the international level on the fight against climate change. New steps related to human rights and environmental protection are expected to be discussed at this event. Azerbaijan is taking a number of important steps both nationally and internationally in the fight against climate change. It is aimed to provide 30 percent of total energy production from renewable sources by 2030. In particular, the declaration of the Karabakh and East Zangezur regions as green energy zones has paved the way for the development of solar and wind energy projects. The initiative to create the first carbon market in Azerbaijan serves to reduce carbon emissions and direct companies to more environmentally responsible activities. By increasing forest areas, serious steps are being taken in Azerbaijan to achieve the goal of protecting the ecosystem and absorbing carbon that affects the climate. "Smart" villages and cities – sustainable agriculture and environmentally friendly infrastructure are being developed in Karabakh within the framework of the "Green Shusha, Green World" initiative. "Smart" village and city projects are aimed at the efficient use of resources and environmental protection. (A Framework for Developing Smart Villages in Azerbaijan, 2021) COP29 preparations – Azerbaijan's hosting of COP29 will support the adoption of new solutions and relevant commitments on climate change within the framework of international cooperation. Within the framework of this event, Azerbaijan plans to strengthen its leading position in the fight against climate change. The measures taken are aimed at ensuring the ecological security and sustainable development of Azerbaijan, making the country an exemplary partner in the fight against climate change at the international level.

International law has developed various instruments to protect human rights in the fight against climate change. The UN Paris Climate Agreement (2015) aims to limit global warming to 1.5°C and provides financial and technological support to the societies most affected by the effects of climate change. The UN Human Rights Council, in its resolution adopted in 2008, emphasized that climate change is related to human rights and that this should be discussed.

Azerbaijan is taking important steps at the global level to combat climate change and protect human rights. It is important to develop adaptation strategies against climate change at the local level, strengthen laws aimed at protecting the environment, and ensure social justice. Azerbaijan contributes more to international cooperation by supporting climate policy at the global level. This ensures the protection of both the environment and human rights. The interrelationship between climate change and human rights requires serious measures at the global and local levels. Azerbaijan's hosting of COP29 allows for increased steps to be taken in this area and strengthening international cooperation. (In solidarity for the green World, 2024) The protection of human rights and the fight against climate change are essential for sustainable development and social justice. To this end, closer cooperation between Azerbaijan and the countries of the world in the future will contribute to the protection of both the environment and human rights.

Conclusion. Climate change is becoming a growing threat to current and future generations. Impacts such as constantly rising average temperatures, extreme weather events, and rising sea levels are causing life-threatening consequences. Combating these consequences becomes difficult due to the uncertainty, complexity, and unpredictability inherent in climate change. In addition, although policies to combat climate change aim to reduce these threats, they carry the risk of increasing social inequalities and public costs for current generations. In this sense, determining whether policy instruments will trigger significant social problems and their capacity to provide the necessary change and transformation for climate change impacts should form the focal point of the struggle. In this context, the fight against climate change needs to be structured on the basis of an understanding that will include all social problems and encompass the entire society. Social justice undertakes to ensure justice in the distribution of blessings and burdens by envisioning a rights-based approach in solving social problems. Thus, it is suitable as the fundamental principle of problems that include many social problems such as climate change and threaten the existence of societies. However, social justice has positive discrimination arguments for the vulnerable and relatively more vulnerable segments of society. Since the discrimination in question does not include excluding other groups, it ultimately allows for the elimination of inequalities and the establishment of justice. In addition, the effects of climate change, which include uncertainties and have high destructive power, require policies that encourage strong norms and attitudes such as solidarity, social harmony, trust and belonging. Therefore, the fight against climate change needs to be structured on the basis of social justice. The fight against climate change is structured with different principles and approaches in the literature; it is discussed with many different concepts such as economic, social and ecological. Two of these approaches, social policy and resilience, were examined and discussed in this study in the context of establishing social justice. This discussion is important in questioning the need for a new approach today and tomorrow, where the fight against climate change is structured. It is concretely difficult to determine how the fight against climate change will affect social inequalities under both approaches. However, it can be said that it is possible to determine an approach that will serve the principle of social justice by intersecting the basic dynamics of the two approaches with the dynamics of climate change. In this context, three important points that need to be underlined as a result of the study are revealed. First, there is an important difference between the two approaches regarding experience. Social policy is the first-hand addressee of every social problem that has emerged since the industrial revolution. However, resilience is a concept used in the field of social sciences since the 70s and specifically targets environmental sustainability. In this sense, it includes the infrastructural improvements and social supports that social policy currently includes. Accordingly, social policy can provide the social resilience promised by resilience with tools such as education, health services, social security, assurances, etc. In this process, it is seen that the society is fully covered since it is possible to adjust the number and/or density of tools according to the degree of need of the societies. Secondly, the difference in the implementation tools in the two approaches is striking. Resilience is realized through

individual and social initiatives. In the resilience approach, there is a unity of implementation even if public regulations exist, and individuality in terms of institutions. Social policy is under government guarantee with legal regulations and there is support from civil society organizations. Public guarantee is a factor that increases psychological well-being as well as economic and social trust. In addition, since it contributes to the sustainability of societies, it makes it more possible to combat the uncertain structure of climate change. Finally, the two approaches are evaluated in the context of their contents covering the fight against climate change. Resilience underlines the responsibility of the system as a whole and indicates the necessity of transformation. Especially with the understanding of flexibility it contains, it is seen as an important advantage that policies can be changed more easily against the uncertainty of climate change. However, moving away from the meaning attributed to economic growth and the normative content of policies causes doubts about ensuring social justice. However, the current state of social policy needs to be updated and even expanded. However, it is thought that the experience of social policy, its executive tool based on public interventions, its strict adherence to universal norms and its political relationship with normative institutions contain significant potential. In this sense, it can be said that the responsibility, stability and legitimacy required to combat climate change are present in the essence of social policy and that it provides confidence in ensuring the establishment of social justice according to resilience. As a result, social policy and resilience present a climate change combat scenario from two different perspectives.

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DOI https://doi.org/10.30525/2592-8813-2026-2-31

DIGITAL TRANSNATIONALISM: SOCIAL MEDIA AND THE SOCIAL BEHAVIORS OF AZERBAIJANIS IN EUROPE

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Abstract. Contemporary globalization and digitalization processes have significantly transformed migration and diaspora relations. The rapid spread of social media platforms has created new forms of communication that influence everyday interaction, collective behavior, and identity formation within diaspora communities. This article examines the use of social media among Azerbaijanis living in Europe and its influence on their social behavior within the framework of digital transnationalism.

The study analyzes how diaspora members use digital communication technologies to preserve national identity, maintain cultural ties, and strengthen collective solidarity. The research demonstrates that platforms such as Facebook, Instagram, TikTok, Telegram, and YouTube have become important parts of the everyday social life of Azerbaijanis living in Europe. Through these digital environments, individuals remain connected to Azerbaijan while simultaneously adapting to the social and cultural realities of European societies.

The findings show that social media contributes to the formation of hybrid identity models, particularly among younger generations, where Azerbaijani cultural elements are represented together with European lifestyles and values. Digital communication also plays an important role in public mobilization, information exchange, and emotional solidarity within diaspora communities. At the same time, the study highlights certain negative aspects of online interaction, including social comparison, misinformation, and digital fragmentation.

The article concludes that digital transnationalism provides an important theoretical framework for understanding the social relations, cultural transformation, and identity processes of the contemporary Azerbaijani diaspora living in Europe.

Key words: digital transnationalism, social media, Azerbaijani diaspora, European Azerbaijanis, migrant communities, digital identity, cultural transformation.

Introduction. Contemporary globalization and digitalization processes have significantly transformed migration and diaspora relations. The rapid expansion of internet technologies and social media has reshaped the ways individuals communicate, share information, and maintain social connections across borders. As a result, geographical distance no longer limits interaction to the same extent as in previous decades.

These changes have had a direct influence on migrant and diaspora communities. In earlier periods, migrants mainly preserved ties with their homeland through letters, telephone conversations, or occasional visits. Today, digital communication enables continuous and immediate interaction regardless of physical distance. Social media platforms have therefore become an important part of migrants' everyday social life.

For diaspora communities, online environments function not only as communication tools but also as spaces where collective identity, cultural belonging, and social solidarity are maintained. Facebook groups, Telegram channels, Instagram pages, and YouTube content allow Azerbaijanis living in different European countries to exchange information, discuss social issues, and preserve national and cultural values. Through these digital interactions, diaspora members create a shared social environment despite living in different geographical locations.

Within migration studies, transnationalism is regarded as one of the main theoretical approaches explaining migrants' multidimensional relations with both home and host societies. Migrants are not limited solely to integration into the countries where they reside; they also continue to maintain social, cultural, and emotional ties with their homeland. The development of digital technologies has expanded these relations and contributed to the emergence of the concept of digital transnationalism. This concept refers to the continuation of cross-border social relations and collective activities through digital communication technologies.

In recent years, the Azerbaijani diaspora in Europe has expanded both numerically and organizationally. Azerbaijanis migrate to European countries for education, employment, and other social reasons, while continuing to maintain close relations with Azerbaijan through digital networks. National holidays, cultural events, public campaigns, and diaspora activities are widely organized and promoted through social media. These activities demonstrate that online communication has become one of the central elements of contemporary diaspora life.

At the same time, social media influences the everyday behavior of diaspora members in different ways. Digital communication affects self-expression, identity construction, language use, cultural adaptation, and collective participation. In some cases, online interaction strengthens solidarity and emotional attachment within diaspora communities, while in others it may increase disagreements and social fragmentation. For this reason, digital transnationalism provides an important framework for understanding the social and cultural dynamics of the modern Azerbaijani diaspora.

Purpose of the Study. The purpose of this study is to examine the impact of social media on the social behavior of Azerbaijanis living in Europe within the framework of digital transnationalism. The research focuses on digital identity, diaspora communication, cultural belonging, and social interaction formed through online platforms. The study also evaluates both the positive and negative effects of social media on diaspora communities.

Literature Review. Migration and diaspora studies have long focused on issues related to economic, political, and cultural integration. However, the rapid development of digital technologies has significantly changed the character of diaspora relations and introduced new theoretical approaches into migration research. Contemporary scholars emphasize that migrants today maintain social relations not only through physical interaction but also within virtual communication environments. As digital communication technologies become integrated into everyday life, social media platforms increasingly influence identity formation, cultural belonging, and collective interaction among migrant communities.

The theory of transnationalism is considered one of the main conceptual frameworks for explaining these processes. According to Vertovec (2009), transnationalism refers to multidimensional social, cultural, and economic relations established across national borders. This perspective suggests that migrants are connected simultaneously to both their home and host societies. In recent years, the expansion of internet technologies has transformed these relations into more continuous and flexible forms of interaction, leading to the emergence of the concept of digital transnationalism.

Researchers studying migration and digital communication highlight the growing importance of online platforms in maintaining diaspora relations. Madianou and Miller (2012), through the concept of "polymedia," argue that digital communication technologies play an important role in preserving emotional relations among migrant families. Video calls, messaging applications, and social networks reduce the social distance created by physical separation and enable continuous communication between family members living in different countries.

Myria Georgiou (2013) similarly notes that social media functions as an alternative public sphere for diaspora communities. According to her approach, digital platforms create opportunities for migrants to construct collective identities, exchange information, and gain public visibility. Online communication environments therefore serve not only as technical communication tools but also as spaces where social belonging and collective solidarity are formed.

Studies related to the Azerbaijani diaspora also demonstrate the increasing significance of digital communication technologies. Əliyev (2020) argues that Facebook and other social media platforms contribute to preserving national and cultural values among Azerbaijanis living abroad while strengthening diaspora organization and communication. Hüseynova (2021) similarly emphasizes that digital communication has made transnational relations more dynamic and flexible in the contemporary period.

Research on migration and identity additionally shows that social media influences the formation of hybrid cultural identities among younger generations. Appadurai (1996) stresses that globalization and media flows reshape perceptions of identity and create conditions for the emergence of multilayered cultural forms. This perspective is particularly relevant for understanding the digital behavior of Azerbaijanis living in Europe, where national and European cultural elements are often represented together within online environments.

Discussion. The acceleration of globalization and the expansion of digital technologies have significantly transformed contemporary diaspora relations. Today, migrants are able to maintain social, cultural, and emotional ties with their homeland regardless of geographical distance. In this context, the concept of transnationalism has become one of the main theoretical approaches used to explain the multidimensional relations of migrant communities. Modern migrants are connected simultaneously to both their home and host societies, and these connections are increasingly maintained through digital communication technologies.

In traditional migration conditions, communication with the homeland was mainly limited to letters, telephone conversations, and occasional visits. The spread of internet technologies and social media has changed this situation considerably. Digital communication allows individuals to participate continuously in the social and cultural life of their homeland while physically residing abroad. As a result, transnational relations have become more dynamic, immediate, and integrated into everyday life.

The development of digital communication has also led to the emergence of the concept of digital transnationalism. This concept refers to the continuation of social relations, cultural interaction, and collective activities through online communication environments. Digital transnationalism is not limited to technical communication; it also includes the formation of collective identity, emotional solidarity, and social belonging within virtual spaces. Through social media, diaspora members exchange information, express cultural values, and participate in collective discussions related to social and national issues.

For diaspora communities, digital platforms function as new forms of social space. Facebook groups, Telegram channels, Instagram pages, TikTok videos, and YouTube content allow individuals living in different countries to remain connected and socially active within the same digital environment. These online interactions strengthen social closeness among diaspora members despite physical distance. Particularly during national holidays, public events, and political developments, digital communication increases collective participation and emotional solidarity within diaspora communities.

Digital transnationalism also has an important influence on identity formation. Azerbaijanis living in Europe often combine elements of Azerbaijani culture with aspects of European social life in their online activities. This tendency is especially visible among younger generations. Social media posts frequently include Azerbaijani music, national symbols, folklore elements, and native language together with global cultural trends and European lifestyles. Such practices contribute to the emergence of hybrid identity models shaped by both national and global cultural influences.

At the same time, digital communication plays an important role in social organization and adaptation processes. Online groups provide migrants with practical information related to education, employment, legal procedures, accommodation, and migration issues. In many cases, diaspora members use digital platforms as informal systems of social support. Newly arrived migrants and students especially benefit from these communication networks during adaptation processes in European societies.

Digital platforms also contribute to public mobilization among diaspora communities. During important political and social events, Azerbaijanis living in Europe organize online campaigns, share information in multiple languages, and attempt to influence public opinion through digital networks. Such activities demonstrate that social media functions not only as a communication tool but also as a space for collective action and public participation.

However, digital transnationalism also has certain negative dimensions. The rapid circulation of information may increase the spread of disinformation, emotional polarization, and social fragmentation within online communities. Different political and ideological positions are often expressed more openly on digital platforms, which can intensify disagreements among diaspora members. In addition, idealized lifestyles presented on social media may create social comparison and psychological pressure, particularly among younger users.

Digital transnationalism has become an important feature of contemporary diaspora life. The online activities of Azerbaijanis living in Europe show that digital communication technologies influence not only social interaction but also identity formation, cultural transformation, and collective behavior. In this context, digital transnationalism provides a useful framework for understanding the changing nature of modern migration and diaspora relations.

The Digital Social Environment of Azerbaijanis in Europe

In recent years, the use of social media among Azerbaijanis living in Europe has become increasingly widespread. Previously, diaspora relations were mainly maintained through cultural meetings, local organizations, and face-to-face communication. Today, however, digital platforms have become one of the primary spaces for communication, information exchange, and social interaction within diaspora communities. Internet technologies have transformed the ways Azerbaijanis living in different European countries maintain contact with one another and preserve their connection with Azerbaijan.

Facebook groups, Telegram channels, WhatsApp networks, Instagram pages, TikTok videos, and YouTube platforms are actively used by Azerbaijanis across Europe. These online environments support not only personal communication but also discussions related to migration, education, employment, cultural identity, and social adaptation. National holidays, cultural events, student experiences, and public issues related to Azerbaijan are among the topics most frequently shared within digital communities.

Social media has also strengthened the sense of social closeness among diaspora members. Although migrants live in different countries and social environments, online communication enables them to remain connected in everyday life. Azerbaijanis living abroad regularly follow developments in Azerbaijan, communicate with relatives and friends, and participate in digital discussions concerning national and social issues. In this way, digital communication partially reduces the social distance created by migration.

Online communication networks additionally function as informal systems of social support. Newly arrived migrants often receive practical information related to employment, accommodation, education, legal procedures, and migration processes through social media groups. In many cases, diaspora members share personal experiences and recommendations that help others adapt more easily to life in European societies. This process is especially important for students and young migrants.

Observations also show that social media contributes to the formation of hybrid identity models among young Azerbaijanis living in Europe. Young people actively engage with European social life while simultaneously expressing attachment to Azerbaijani culture through digital content. The use of Azerbaijani music, national symbols, traditional cuisine, and folklore elements in online posts reflects the preservation of cultural belonging within virtual environments. At the same time, the combined use of Azerbaijani together with English, German, and other European languages demonstrates the emergence of multilayered cultural identities.

Digital communication also plays an important role in preserving collective cultural memory. During Novruz celebrations, remembrance days, and public events related to Azerbaijan, the digital activity of diaspora members becomes more visible. Through social media, individuals share national traditions, cultural practices, and historical symbols with wider audiences. Such activities strengthen collective identity and cultural continuity among diaspora communities.

Social media further contributes to public mobilization among Azerbaijanis living in Europe. During important political and social events, diaspora members organize digital campaigns, circulate information in multiple languages, and coordinate collective activities through online platforms. Particularly during periods connected with national issues, digital communication increases solidarity and public visibility within diaspora communities.

At the same time, digital platforms may also create certain social tensions. Political disagreements, ideological differences, and emotionally charged discussions are often more visible in online environments. In some cases, this may contribute to social fragmentation within diaspora communities. Nevertheless, during periods related to common national interests, tendencies toward collective solidarity generally become stronger.

The digital social environment of Azerbaijanis living in Europe has become more than a simple communication space. It now serves as an important social sphere where identity, cultural belonging, solidarity, and everyday social behavior are shaped through digital interaction.

Table 1

The Most Active Social Platforms Among Azerbaijanis Living in Europe and Their Influence on Social Behaviors

Platform	Main Purpose of Use	Influence on Social Behavior	Examples
Facebook	Diaspora organization and public discussions	Collective solidarity and information sharing	Tədbir elanları, iş və yaşayış qrupları
Instagram	Visual self-expression	Representation of national identity	Novruz-related posts, national cuisine
TikTok	Entertainment and short-form videos	Cultural identity formation among youth	Videos featuring Azerbaijani music
Telegram	Practical information and support	Social adaptation	Migration and university groups
WhatsApp	Everyday communication	Preservation of family and diaspora connections	Family groups and daily messaging
YouTube	Video blogs and information sharing	Sharing migration experiences	Vlogs about life in Europe

Source: Prepared by the author on the basis of social media observations and diaspora group activities

Social Media Networks of Azerbaijanis in Europe

Observations of the digital activities of Azerbaijanis living in Europe demonstrate that social media platforms have become important tools for communication, organization, and cultural interaction within diaspora communities. In particular, Facebook groups play a major role in information exchange and the development of social solidarity. Groups such as "Azerbaijanis in Germany," "Azerbaijanis in Vienna," and "Azerbaijan Community in Europe" regularly share information related to employment, education, migration procedures, and everyday social life. In many cases, members use these groups not only to receive practical information but also to seek advice, share personal experiences, and establish new social connections. These digital communities are especially useful for newly arrived migrants and students adapting to European societies.

Facebook groups are also actively used during national holidays, cultural events, and public discussions related to Azerbaijan. Announcements about Novruz celebrations, student meetings, charity activities, and diaspora gatherings are frequently shared through these online communities.

As a result, digital interaction contributes to strengthening social participation and maintaining collective connections among Azerbaijanis living in different European countries.

Instagram and TikTok are used more actively for visual self-expression and cultural representation. Young Azerbaijanis living in Europe frequently share content related to national cuisine, Azerbaijani music, Novruz celebrations, travel experiences, and everyday life abroad. In many cases, elements of Azerbaijani culture are presented together with European urban lifestyles, reflecting the emergence of hybrid identity models among diaspora youth. For example, videos recorded in cities such as Vienna, Berlin, or Amsterdam are often accompanied by Azerbaijani music or national cultural symbols. Such content demonstrates how diaspora youth combine local and national cultural elements within digital environments.

Telegram groups mainly function as practical information networks. These groups provide information concerning university admission procedures, legal documentation, accommodation, health insurance, employment opportunities, and migration-related issues. Students often exchange information about scholarships, dormitories, and language courses, while migrants discuss everyday adaptation problems and legal procedures. For many users, these digital networks serve as informal support systems that simplify adaptation processes in foreign social environments.

WhatsApp is used primarily for maintaining close family and friendship relations. Azerbaijani families living in different countries regularly communicate through messaging applications and video calls. Family celebrations, holiday greetings, and everyday conversations are increasingly maintained through digital communication technologies, helping preserve emotional closeness despite geographical distance. In some cases, family members living in Azerbaijan and Europe participate simultaneously in online conversations and celebrations, which reduces the emotional impact of migration and physical separation.

YouTube has also become an important platform for representing diaspora experiences. Azerbaijani bloggers living in Europe produce videos about migration, student life, cultural adaptation, travel experiences, and everyday social realities abroad. Vlogs related to life in cities such as Vienna, Berlin, and Amsterdam increase the visibility of diaspora life while also providing practical and social information for wider audiences. Some bloggers share personal experiences related to studying, finding employment, adapting to European society, and balancing Azerbaijani cultural identity with life abroad.

These digital platforms function not only as communication channels but also as virtual social spaces where collective memory, cultural belonging, and national identity are preserved and reproduced. Through online interaction, Azerbaijanis living in Europe maintain ties with their homeland while simultaneously adapting to the societies in which they live. Social media has therefore become one of the central elements shaping the contemporary social life of the Azerbaijani diaspora.

Table 2

The Most Active Social Media Groups of Azerbaijanis Living in Europe and Their Areas of Activity

Platform	Example of Group / Page	Main Area of Activity
Facebook	"Azerbaijanis in Germany"	Employment, Living, and Diaspora Connections
Facebook	"Azerbaijanis in Vienna"	Events and Social Organization
Telegram	"Azerbaijan Students in Austria"	Education and Student Support
Telegram	"Azerbaijanis in Germany"(Azerbaijani-language group)	Migration and Legal Information
Instagram	Personal pages of diaspora youth	National Identity and Everyday Life
TikTok	Azerbaijani musical short videos	Cultural Representation and Entertainment
YouTube	"Life in Vienna"-type vlogs	Life in Europe and Migration Experiences

Source: Prepared by the author based on observations conducted on the Facebook, Telegram, Instagram, and YouTube platforms

Another important aspect of contemporary diaspora organization is the emergence of coordination centers and umbrella networks established by Azerbaijanis living in different European countries. In recent years, various diaspora coordination groups operating in cities such as Berlin, Vienna, Brussels, and Paris have increasingly used digital platforms to organize collective activities and strengthen communication among diaspora members. These centers coordinate cultural events, educational projects, charity campaigns, and public discussions through social media networks.

Digital communication technologies allow such organizations to maintain continuous interaction with Azerbaijanis living in different countries simultaneously. Information related to migration procedures, student support, cultural events, and public campaigns is often distributed through Facebook groups, Telegram channels, and WhatsApp networks connected to these coordination structures. In many cases, coordination centers also contribute to strengthening collective solidarity during important political and social developments related to Azerbaijan.

The activities of these digital coordination networks became particularly visible during periods of public mobilization connected with national issues. Through online communication, diaspora organizations were able to coordinate information sharing, organize collective campaigns, and increase the visibility of Azerbaijani communities within European public spaces. As a result, coordination centers supported not only social interaction within diaspora communities but also the development of collective digital participation and transnational communication practices.

The Impact of Social Media on Social Behavior

The widespread use of social media has significantly influenced the everyday behavior, communication patterns, and social relations of Azerbaijanis living in Europe. Digital platforms today function not only as communication tools but also as social environments where identity, cultural belonging, and collective interaction are continuously shaped. For diaspora communities, social media creates opportunities both to preserve ties with the homeland and to participate actively in the social life of host societies. Many Azerbaijanis living abroad now spend a considerable part of their daily communication within digital environments, where social interaction increasingly takes place through online networks and virtual communities.

One of the most visible effects of social media is digital self-expression. Diaspora members present their daily lives, cultural values, and personal experiences through online platforms. This tendency is especially strong among younger generations. Azerbaijani youth living in Europe often combine elements of European urban life with Azerbaijani cultural symbols in their online content. Posts including Azerbaijani music, traditional cuisine, national holidays, travel experiences, and everyday life abroad reflect the formation of hybrid identity models within digital environments. In many cases, social media profiles become spaces where users attempt to balance integration into European society with the preservation of national identity and cultural attachment.

Social media also contributes to the formation of collective emotional reactions and solidarity. Important social and political events related to Azerbaijan frequently become subjects of collective discussion within diaspora networks. During periods connected with national issues, Azerbaijanis living in different European countries organize online campaigns, share information in multiple languages, and express collective emotional support through digital platforms. Shared hashtags, public statements, and digital campaigns increase the visibility of diaspora communities and strengthen collective participation in online spaces. These activities demonstrate that digital communication has become an important instrument of public mobilization within diaspora communities.

Family relationships are also strongly influenced by digital communication technologies. Video calls, messaging applications, and social networks enable Azerbaijani families to maintain daily communication despite geographical separation. Family celebrations, routine conversations, emotional support, and even traditional holiday gatherings are increasingly carried out through digital platforms. As a result, social media partially reduces the emotional distance created by migration and

strengthens family cohesion. For many migrants, regular communication through digital platforms helps preserve emotional attachment to relatives and everyday family life in Azerbaijan.

Another important aspect is social support. Many migrants receive practical information related to employment, education, accommodation, healthcare, and legal procedures through online groups and digital communities. Especially for students and newly arrived migrants, social media functions as an informal support network that facilitates adaptation to life in Europe. Users often share recommendations concerning universities, language courses, migration procedures, and job opportunities. Such exchanges simplify everyday life and contribute to the formation of mutual support networks within diaspora communities.

The influence of social media is also visible in language use. Azerbaijani youth living abroad frequently combine Azerbaijani with English, German, and other European languages in their online communication. Such multilingual practices reflect the multicultural social environment of diaspora life and demonstrate the emergence of flexible identity models shaped by both local and global influences. In some cases, users switch between several languages within the same post or conversation, reflecting their connection to multiple cultural environments simultaneously.

At the same time, social media may also create certain negative effects. Idealized lifestyles presented on digital platforms can lead to social comparison and psychological pressure, particularly among younger users. Digital popularity, follower numbers, and online visibility are sometimes perceived as indicators of social success. In addition, political disagreements and ideological differences expressed online may contribute to social tension and fragmentation within diaspora communities. The rapid spread of information through digital networks may also increase the circulation of misinformation and emotionally charged content.

Social media influences the social behavior of Azerbaijanis living in Europe in different ways. Alongside strengthening cultural attachment and collective solidarity, digital communication also creates new social and psychological challenges connected with contemporary online life.

The table below summarizes the main directions of the influence of social media on the social behavior of Azerbaijanis living in Europe:

Table 3

Main Areas of the Influence of Social Media on the Social Behavior of Azerbaijanis Living in Europe

Area of Social Behavior	The Impact of Social Media	Example
Digital Self-Expression	Representation of Personal and National Identity	Novruz Posts and National Music Videos
Social Solidarity	Formation of Collective Emotional Reactions	Digital Campaigns Related to Karabakh
Family Relationships	Maintenance of Daily Long-Distance Communication	Video Calls and Family Groups
Social Support	Sharing Practical Information for Migrants	Employment and Housing Groups
Language Use	Emergence of a Multilingual Communication Model	Combined Use of Azerbaijani and European Languages
Cultural Identity	Digital Sharing of National Values	National Cuisine and Folklore Videos
Psychological Effects	Social Comparison and Digital Pressure	The Influence of “Ideal Life” Images

Source: Prepared on the basis of the author’s theoretical analysis and observations of diaspora social media activities

Thus, social media exerts a multidimensional influence on the daily behavioral patterns, social relationships, and cultural identities of Azerbaijanis living in Europe. While digital platforms foster social closeness, collective solidarity, and cultural attachment on the one hand, they also contribute to the emergence of new social and psychological challenges on the other. In this regard, social media can be regarded as both an integrative and a transformative component of diaspora life.

Digital Identity and Cultural Transformation

The digital environment plays an important role in shaping the identity of Azerbaijanis living in Europe. Social media enables diaspora members to present both national and global identity elements simultaneously. Digital platforms today function not only as communication tools but also as spaces where cultural belonging, social values, and personal identity are expressed and reproduced.

This process is particularly visible among younger generations. Azerbaijani youth living in Europe actively participate in European social life while continuing to preserve elements of Azerbaijani culture through digital communication. Their online content often combines European lifestyles with national traditions, music, language, and cultural symbols. Such practices reflect the emergence of hybrid identity models formed under the influence of both local and global cultural environments.

Social media also contributes to preserving collective cultural memory. Azerbaijani music, national cuisine, folklore traditions, and historical symbols are widely shared through online platforms. During Novruz celebrations and other national events, digital activity among diaspora members becomes especially intensive. These online practices strengthen cultural attachment and create a sense of collective belonging among Azerbaijanis living abroad.

Language use represents another important aspect of digital identity formation. Many diaspora members, especially young people, use Azerbaijani together with English, German, and other European languages in their social media communication. In some cases, several languages appear within the same post or conversation. This multilingual communication style reflects both integration into European societies and continued attachment to Azerbaijani cultural identity.

Visual representation also plays a major role in the construction of digital identity. Shared photographs, videos, profile images, music preferences, and cultural symbols demonstrate how individuals choose to represent themselves in digital environments. Some users emphasize national identity more strongly through Azerbaijani symbols and traditions, while others present more cosmopolitan and global lifestyles. This diversity shows that digital identity remains flexible and constantly evolving.

The digital environment also accelerates cultural transformation processes. Young Azerbaijanis growing up in Europe are influenced simultaneously by Azerbaijani traditions and global digital culture. In some cases, this creates differences between generations. While older generations tend to preserve more traditional cultural practices, younger people often adopt more flexible and hybrid cultural behaviors shaped by global media and online interaction.

At the same time, digital communication may increase the influence of global popular culture and weaken certain traditional cultural practices. International trends, entertainment content, and global visual culture sometimes reduce the visibility of national traditions in everyday life. Nevertheless, many Azerbaijanis living in Europe attempt to balance global cultural influences with the preservation of national identity and cultural belonging.

Overall, digital identity has become an important component of the cultural transformation processes experienced by diaspora communities. Through social media, Azerbaijanis living in Europe preserve connections with their homeland while simultaneously adapting to multicultural social environments. In this regard, digital platforms function as dynamic spaces where identity, culture, and social belonging are continuously negotiated and reshaped.

Conclusion. The study shows that digital transnationalism plays an important role in shaping the social relations, everyday behavior, and cultural identity of Azerbaijanis living in Europe. Social media has become more than a communication tool for diaspora communities; it now functions as a space where cultural belonging, collective interaction, and social solidarity are maintained.

The findings indicate that Azerbaijanis living in different European countries actively use digital platforms to preserve ties with Azerbaijan, maintain family and friendship relations, and participate in discussions related to national and social issues. Online communication has reduced the sense of distance created by migration and strengthened everyday interaction within diaspora communities.

The research also demonstrates that social media contributes to preserving and reproducing national identity. Azerbaijani language, music, folklore, traditional cuisine, and cultural symbols are widely represented in digital environments. Among younger generations, the combination of Azerbaijani and European cultural elements reflects the development of hybrid identity models shaped by multicultural social environments.

At the same time, digital communication increases opportunities for collective mobilization and public participation within diaspora communities. During important social and political events, Azerbaijanis living in Europe use online networks to share information, express solidarity, and organize collective activities. However, the study also shows that digital environments may create challenges such as social comparison, misinformation, and online fragmentation, particularly among younger users.

These tendencies demonstrate that digital communication technologies have become one of the central elements of contemporary diaspora life. The experiences of Azerbaijanis living in Europe show how social media influences identity formation, cultural transformation, and everyday social interaction within transnational communities.

Further research may focus on the psychological and cultural dimensions of digital diaspora life, especially the online behavior of second-generation migrants, the preservation of collective memory, and the transformation of identity in virtual environments.

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THEORY AND DEVELOPMENT OF POLITOLOGY & HISTORY

DOI https://doi.org/10.30525/2592-8813-2026-2-32

SOCIAL REVIVAL IN THE POST-WAR PERIOD: THE DOST CONCEPT AS IMPLEMENTED IN KARABAKH

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Abstract. This article approaches the institutionalization of social services as a tool for ensuring rapid and sustainable social stabilization. Establishing social services from scratch in a post-conflict area like Karabakh required a lot of manpower and resources. The DOST concept, created on the basis of the experience of local and foreign models, began to operate as a leapfrogging model that would provide access to social services in a short time for the population relocated to Karabakh in a region where the socio-economic infrastructure was completely destroyed. Since part of Karabakh is mountainous and its infrastructure was also destroyed, a mobile social service mechanism was also created within the DOST concept, which could be an adequate solution to this. Within the framework of this model, the "temporal gap" of 5–10 years normally required for the construction of infrastructure is eliminated, ensuring the accessibility of the population to social services in a short time. This concept also includes the "single window" model, which ensures the effectiveness and operativeness of the services provided in Karabakh with the mechanism of combining services in a single enterprise and digitizing them. Because of these, Karabakh can be considered a de facto "Living Lab" for post-conflict reconstruction.

Key words: Social service, social policy, Karabakh war, post-conflict period, reintegration, infrastructure.

Introduction. Wars have occurred in every period of history. Wars are also a reality of the modern era, and the inevitable consequences of war pose a great threat to the healthy development of human society. War is mainly analyzed from economic and political aspects, but the social impacts of war can sometimes play a more significant role in society than all these aspects. Because the series of social events caused by war lasts a relatively long time. When we say that war has a destructive effect, we mean a phenomenon that deeply changes not only the physical, but also the social structures of society, the collective consciousness and the system of everyday relationships. That is why creating access to social services in the post-conflict area is vital for the population.

The purpose of the research is to analyze the concept of DOST (Agency for Sustainable and Operational Social Security), which provides social protection to the population resettled in Karabakh in the post-war period. This study also assesses how the reintegration of the resettled population was facilitated through the single window model. In other studies, the post-war reconstruction process is mainly examined through the prism of physical infrastructure, but in this study, the institutionalization of social welfare is approached through the prism of ensuring rapid and sustainable social stabilization. The study also examines how the creation of high-tech social service infrastructure in regions where infrastructure has been completely destroyed as a result of the implementation of the DOST concept affects social reintegration.

Main text. The First Karabakh War, which began in 1988 and lasted until 1994, took place between Armenia and Azerbaijan. Unfortunately, the Karabakh conflict caused a lot of suffering and deeply traumatized people. When the Soviet Union collapsed, the geopolitical importance of two countries, Armenia and Azerbaijan, was not immediately apparent to Western countries. This was mainly due to

the West's poor experience with the South Caucasus. The OSCE Minsk group-led negotiation process failed to persuade the leaders of Azerbaijan and Armenia to make mutual concessions. Despite the fact that considerable negotiations took place during this process and various solutions were offered to the opposing parties, a mutually acceptable agreement could not be reached (Jović-Lazić, 2021, pp. 219-220). After the ceasefire agreement signed in May 1994, the process of negotiations on the settlement of the "Nagorno-Karabakh conflict" had not yield any results until an all-out war broke out (Iskandarov & Gawliczek, 2021, p. 30). The First Karabakh War was mainly fought from 1992 through 1994 and resulted in the loss of the mountainous Karabakh region to Armenia (Erickson, 2022, p. 224). The fighting in Karabakh was fierce, with many civilian deaths, but the war was overshadowed by the conflicts in the former Yugoslavia, and attention shifted from Karabakh to Yugoslavia. Of course, there were many reasons for this, one of which was the location of the former Yugoslavia in Europe.

The conflict over Karabakh is one of the most severe and complex ethno-regional asymmetric conflicts in the post-Soviet region (Kocaoğlu & Kuzu, 2023, p. 131). Both sides had different goals and legal statuses in this conflict. This led them to look at the issues completely differently and from their own prisms. Of course, no conflict is eternal, and just as everything ends, wars also end.

With the end of the 44-day Second Karabakh War, which began on September 27, 2020 and lasted until November 10, 2020, an agreement was reached between the parties and major steps were taken towards peace. The war, which put an end to the conflict, can still provide a common ground for the two countries to benefit from the new reality in the region. The trilateral agreement can serve as an important step towards reaching peace between the two nations (Shafiyev & Huseynov, 2023, p. 255). Trade is an important indicator of the realisation of peace between the countries. These issues include the opening of markets and borders, the laying of railways, and the sale of Azerbaijani oil products to Armenia.

The end of the war necessitated large-scale rehabilitation and reconstruction of the liberated territories. Settlement and mass return in themselves require the creation of jobs and the prior establishment of social security, which necessitates a comprehensive approach to solving the problems of return and settlement (Aliyev & Aliyev, 2024, p. 13). In the post-war period, the formation of social service mechanisms for the population after their resettlement to Karabakh is an important basis, and the DOST concept plays an exceptional role here. Through the DOST concept, in addition to ensuring social protection for vulnerable population groups, especially families of martyrs and war participants, it plays a unique role in restoring stability and social solidarity in Karabakh.

The process of social revival in Karabakh is one of the most important issues to be resolved in the post-war period. In this sense, the creation of a single system that could solve social issues for the population resettled in Karabakh was important. As we have seen from world experience, the greatest obstacle is the fragmentation of access to social services in regions newly liberated from the hotbed of conflict. Usually, in many countries, these systems provide services in a fragmented manner. For example, one institution provides services for refugees, while another institution provides pension services. Access to social services in post-conflict regions is extremely low and may take years to establish. The main reasons for this can be grouped as follows:

1) Security issues;
2) Lack of technical and physical infrastructure;
3) Staff shortages.

The integration of human services has taken on many different meanings over the past two decades. For some, it means better coordination between human service programs and agencies. For others, it involves the physical co-location of related services. The authors conclude that service integration cannot be defined by a particular service model or outcome, but instead should be conceived of as an ongoing reform process (Austin, 2014, p. 9). This shows us the importance of using a complex mechanism, not a single model, when restoring social services in post-conflict areas.

The concept of services integration does not specify either a centralized or decentralized model. Many integrated service models include redefinitions of professional roles, with greater autonomy and flexibility at the direct service level. New roles and responsibilities may put additional pressures and unrealistic expectations on staff (Austin, 2014, pp. 14–15). The lack of clear guidelines on who will be served and the lack of adequate resources create barriers to problem solving. Some staff who are used to dealing with issues in narrow areas may have difficulty adjusting to these new demands and responsibilities. In its simplest form, the term "integrated services" refers to examples of joined-up social services, for the benefit of service users and to improve efficiency in delivery by providers (OECD, 2015, p. 16).

There are a number of problems with classical integration models. The creation of social support mechanisms that respond to modern challenges and new trends is a very important basis for the population of Karabakh. These innovations contribute not only to the newly resettled people, but also to the development of the surrounding regions of Karabakh. The jobs that continue to be created in Karabakh will also become another economic center of gravity for the surrounding regions. As in the world, ensuring the well-being of citizens in Azerbaijan acts as a successful implementation of the state's targeted social reform program. In the post-war period, not only the restoration of physical infrastructure, but also the restoration of social service mechanisms is of vital importance. Traditional social service models are built on long procedures and a complex management mechanism.

Community-Based Social Protection (CBSP) does not have a clear definition or conceptual framework. This model, which is also supported by the United Nations, protects community members from risk through locally arranged social protection measures that are predicated on people's cultural beliefs (Mupedziswa & Ntseane, 2013, p. 85). The main features of this model are that institutions are developed at the local level, usually rely on family or community networks, and have strong elements of interaction (Browne, 2013, p. 2).

Disarmament, Demobilization, and Reintegration (DDR) is the most widely recognized model used globally, particularly in post-conflict settings. This model consists of 3 broad parts, but the reintegration part, which is relevant to our topic, also has major shortcomings. In this model, the main focus is on addressing psychological trauma, and community participation is considered essential to promote reintegration and reduce stigma. DDR focuses on communal healing and building trust among affected populations (Porto & Alden, 2016, p. 26).

These classical reintegration programs fail to adequately manage or guide the complex and multifaceted reintegration processes they aim to influence, and at best have a positive impact on them. Because they often fail to successfully reintegrate any percentage of the targeted groups (Willems, 2015, p. 119). These are also considered to be major barriers that slow down citizens' access to social services. The application of the classical social service mechanism creates a number of problems:

1. Delay in access to opportunities created for war participants and victims;
2. Weakening of the process of reintegration of war participants and victims into society;
3. Decreasing citizens' trust in the state;
4. Decreasing use of the social service sphere.

The need to establish an operational social service institution in Karabakh. The integration of vulnerable population groups resettled to Karabakh attracts special attention here. Because they need special care first of all, and in a region whose infrastructure is completely destroyed, access to every service is of great importance to them. Specialized social service programs have been developed for people with disabilities and children who are planned to be resettled to Karabakh. Based on the plans, it was determined in advance under what conditions and at what distance access to services would be provided, and infrastructure facilities began to be built accordingly. The full establishment of the necessary infrastructure and its local character in each region are also one of the top priorities.

Because not all vulnerable population groups have the same accessibility to social service institutions as others. As a result, a completely separate system needs to be planned for them. Therefore, the resettlement process to the liberated regions is also being carried out in stages. If the resettlement process is carried out without preparing all social infrastructure, this may worsen their living conditions instead of improving them. Implementing a fundamental social policy in each region of Karabakh separately would require a lot of time and resources. Since the provision of social services for the residents of Karabakh was an important basis, it was necessary to quickly establish a complex system. However, the establishment of traditional social service institutions and facilities could not meet this requirement. The challenges facing the establishment of traditional social service institutions in this region can be summarized as follows:

1. High financial requirements;
2. Dilapidated infrastructure;
3. Mined terrain.

All this made it difficult to implement social services in the traditional form in separate institutions. For rapid and sustainable reintegration in Karabakh, unifying all these services was an important basis. Because the distribution of social services among separate institutions and organizations requires a lot of financial resources. This would have meant that the reconstruction of the destroyed infrastructure would have been significantly delayed financially. Establishing a mechanism operating in a fragmented manner in a region with a very weak and destroyed infrastructure could also lead to bureaucratic obstacles in creating social welfare. The distribution of services meant that buildings would be located at different distances and accessibility would be difficult. This also meant that citizens with disabilities, especially from vulnerable population groups, would have less access to these services. This could also have weakened their motivation to benefit from social services. They also needed a system that would ensure their accessibility to these services through a single system. For this reason, the so-called single window system was chosen as the most adequate mechanism. This model itself was used in other regions of Azerbaijan before Karabakh, which meant prior experience for the DOST centers to be established in Karabakh.

One of the first tasks to be done was not only the restoration of enterprises for state bodies in Karabakh, but also the establishment of a new social management model. Improper planning of the social management model means that problems will arise in the short or long term. This management model is complex due to the large number of problems in the area. When developing and implementing social policy, the socio-economic characteristics of specific regions must be taken into account. That is, the process of implementing social revival in Karabakh should be carried out in a phased manner, starting from those regions whose situation is more favorable than other regions and moving towards regions in crisis.

Unlike classical models, the DOST concept places special emphasis on strengthening trust between the state and citizens, and therefore keeps a people-oriented approach at the center. In post-conflict areas, the formation of trust between the state and citizens is of exceptional importance. Because if this trust is not justified, people may remain dissatisfied with the conditions they live in even if they return to their homeland. This may gradually lead to the dynamics of population decline in Karabakh. In our opinion, trust is the main social capital that underlies the restoration of society in the post-war period. While the DOST concept implemented in Karabakh builds trust between the state and citizens, we can say that it does so at 3 different levels:

1. Individual level – forming trust that the state cares for citizens at the individual level;
2. Institutional level – at this level, the services provided by the "DOST House" and DOST Agencies as social service institutions are accessible, humane and transparent;
3. Society level – at this level, the implementation of various activities and measures in the field of strengthening social solidarity in the post-war period.

Single window model in post-conflict reintegration. A stable and continuous citizen-state contact line is an important basis for the normal functioning of social infrastructure. We have also witnessed from world experience in some African countries, Colombia and the Balkans, where the war is still ongoing and which also have relatively stable political continuity, that the fragmentation of social services has become the biggest problem. One of the main goals in creating the DOST model was to ensure that the same system operates not only in war conditions, but also in peacetime. In other words, this model was designed in such a way that it already included a mechanism adapted for the post-conflict zone from the time it was put into operation. This makes this model one of the most ideal social service institutions for a post-conflict zone like Karabakh. The concept of "Sustainable and Operative Social Security", a local product of the Republic of Azerbaijan, was awarded 44 international certificates and awards in 2022 and 2023 alone (Dayanıqlı və Operativ Sosial Təminat Agentliyi, 2020). The main goal of establishing DOST centers is to organize the provision of citizens with operational and sustainable social services. The DOST model has initiated a transition to a new stage in social policy by forming the basis of institutional and structural reforms implemented in Azerbaijan. The reasons that make the DOST model an exemplary example can be listed as follows:

1. The use of innovative solutions in the mechanism of social protection of the population;
2. The complete coverage of DOST centers, without excluding any area that is part of the social protection system;
3. The establishment of social services on a digital level, which has become the standard of the modern era.

Both foreign and local experience was used in the creation of the DOST concept. The DOST "single window" model was built on the experience of countries such as Chile, Norway, Canada, Australia, as well as Azerbaijan's own local project, ASAN Service. One of the important tasks that implements the functionality of the DOST concept is electronic document circulation and the digitization of services. It is possible to show the working mechanism of the DOST concept in 3 parts: According to this concept, DOST centers, which are "front offices", provide direct contact with citizens. "Back offices" are institutions subordinate to the ministry, and the DOST Agency, which performs the function of the "middle office", provides the functionality of the model (Əliyev, 2024, s. 4).

The DOST experience is based on the "single window" model, which is considered a single point of access to social services offered by government agencies as a means of ensuring efficiency in the public sector. A similar model was first implemented in Australia in the 20th century and has since spread to countries around the world (OECD, 2023 pp. 32-33).

The main goal of the "single window" principle, which is the basis of the DOST model, is to bring together the activities of various social services, especially those providing services in the field of employment and labor, and to ensure information exchange between citizens and these institutions using technology. One of the achievements of the "single window" principle is that it plays an effective role in preventing corruption. This principle drastically prevents corruption. Of course, it is also worth noting that although this model ensures the prompt provision of social services, a number of problems may arise during its implementation. It can be stated that the distribution of resources within the framework of the application of this model may create difficulties in the prompt and substantive resolution of citizens' applications. Just as the scope of influence of each social problem is different, the resources required for the provision of social services may also differ. Since some services require fewer or, conversely, more resources than others, this can lead to potential differences in the effectiveness and quality of social services. These potential differences in themselves lead to imbalances in the provision of citizen applications. To further improve social services provided within the framework of the "single window" model and to ensure efficient use of time by citizens, digitalization of services based on the model discussed can be proposed (Fábián & Kollár, 2023, pp. 131–133).

There is a model in economics called "leapfrogging," and this model is a development strategy in which developing economies or firms make a direct transition to advanced, modern technologies, bypassing intermediate, outdated technologies (Schiffer, 2020, p. 30). According to the traditional approach, after the war, the basic infrastructure should first be established in the area, and after this long-term process, digital services should be implemented. In this sense, we can call the DOST model a leapfrogging in the field of social services. The “single window” model of the DOST concept clearly proves that this model, which is applied in the economic sphere, can also be applied in the social sphere to ensure the accessibility of all services. The DOST model reflects Azerbaijan's breakthrough methodology in social management. The creation of centers such as "Smart DOST" and digital services in a post-conflict area, where all kinds of infrastructure have been completely destroyed, directly forms the transition to the standards of the 4th Industrial Revolution, bypassing the intermediate transition stages. This is an internationally important precedent that can support social revival in the post-conflict period.

The unique features and working principles of DOST centers located in Karabakh. The lack of social infrastructure in Karabakh created a "clean slate" (tabula rasa) for Azerbaijan. While other nations struggle with the transition from paper to digital, Azerbaijan is building a "Digital First" social reality where the state-citizen relationship is defined by algorithmically-assisted proactive care. Unlike traditional laboratories that operate in very limited and artificial conditions in many countries, Karabakh's Living Lab places all innovations directly into people's daily lives. Karabakh's Living Lab means that it is accepted as a real-world, large-scale testing ground for innovative social, administrative, and technological models in the region. Perhaps there could not be a better opportunity to create a sound, operational, and comprehensive social service system. Indeed, there are moments of opportunity required for a model like the DOST concept to be implemented at a uniform technological standard. This usually happens when there is a need for rapid development. This process, which occurs during such an evolution, is called "windows of opportunity" and points to the role of new paradigms in creating a breakthrough (Lee, 2019, pp. 160-161). The “windows of opportunity” that emerged in Karabakh in the post-conflict period accelerated the transformation of social services. The effective institutionalization of the DOST concept, the newly implemented digital transformation course, and the service mechanism that was assessed and provided in accordance with the needs of the population in the region have created a basis. Unlike traditional and outdated recovery models, this model combines many areas of social services and operates from a single system.

Therefore, the Karabakh issue differs from other post-conflict zones, such as the Balkans and the Middle East: unlike Karabakh, reconstruction in these areas was often simply “rebuilding the old” instead of “building the new”. Since the entire infrastructure of the Karabakh region has collapsed, Azerbaijan is not “fixing” the old system, but creating a completely new, unique “path”. We can safely say that the restoration of Karabakh is a period of “windows of opportunity”, since there are no old and already weakened bureaucratic structures here (for example, complex social departments of the old district executive authorities). Azerbaijan, proceeding from this framework, directly applies the most modern model – the DOST concept. This is institutional leapfrogging. One of the areas of service provided on the basis of the DOST concept is the direction of labor relations, where appeals for violations of labor legislation are accepted. This direction has an important basis in the foundation of the concept. DOST Agency and the State Labor Inspectorate Service operate on the basis of an integrated mechanism for receiving applications for violations of labor legislation, optimizing the reception of applications, as well as increasing the efficiency in resolving these problems. All this aims to ensure citizen satisfaction, which is the essence of the single window model.

The steps taken by DOST centers to protect labor relations, prevent potential labor disputes, and assess these risks and opportunities with the support of professionals can be considered a completely new experience. One of the innovative solutions applied to ensure the accessibility of services in the

field of labor relations in Azerbaijan is the Emergency Electronic Call service to the Ministry of Justice, called “ƏN TEZ” (Fastest). The working principle of this concept is based not only on facilitating access to the services of justice bodies, but also on providing prepared documents on the spot. The concept also creates conditions for services to operate in a very accelerated mode. Of course, in order to achieve any level of service and speed, all local justice bodies are required to join the service network. A number of steps have also been taken to link this mechanism with the DOST concept, and thus this service is currently used in 2 DOST centers. In such a case, citizens can use the relevant service facilities to prepare claims for disputes arising from labor relations, conduct documentation work for mediation on such disputes, as well as conduct mediation processes.

Indeed, the activities of the “DOST House” centers, established within the framework of the DOST concept to ensure inclusiveness and creativity, are of exceptional importance for vulnerable population members. They play the role of an important institution that allows them not to feel alone and to have a job. In our opinion, the “DOST House” concept should be implemented in every city and region. Because there were thousands of martyrs as a result of the Second Karabakh War, vulnerable population groups arising from their families, as well as people who became disabled as a result of the war, exist in every region of Azerbaijan. This further increases the importance of the “DOST House” concept. The following persons are admitted to the Karabakh “DOST House”:

1) Persons with disabilities;
2) Members of families of martyrs;
3) Persons with disabilities related to the war and their children;
4) Children who have lost their parents or are deprived of parental care;
5) Members of low-income families.

In our opinion, residents can also participate in the management of social policy implemented in Karabakh. There are some examples of this in the world. Thus, this system, which we can also call "Digital Participation", is sometimes implemented in South Korea under the name "m-Voting", and in Estonia through the platform "Rahvaalgatus". Based on this system, residents can decide which social services should be prioritized. They can vote for and participate in solving local problems, getting rid of outdated and slow bureaucratic mechanisms. Of course, there are a number of differences between these digital participation platforms, but each of them serves the same purpose, namely, improving the social protection system of citizens. The establishment of such a platform in Karabakh within the framework of the DOST concept, which can be of local importance mainly in the regions, can contribute to the development of social revival. Because social policy is mainly implemented in a "general nature". That is, a plan of some work is made for a certain area, city, and its implementation begins. However, when changes are needed or for the implementation of very local tasks, it is sometimes necessary to establish systems that can influence local social policy. The “Smart Village” projects created in Karabakh actually allow the establishment of these platforms and facilitate their implementation. This project facilitates the easier implementation of the DOST model

In order to measure the quality of the social services provided and implement them in a more transparent and operational manner, the centers of the DOST Agency have started accepting and investigating complaints and appeals from the population since 2023 in the cities of Barda, Sumgayit and Baku. The processes of considering citizens' complaints, i.e. writing protocols and receiving explanations, were carried out in the rooms of the DOST centers under video surveillance. Inspections were organized regarding appeals addressed by citizens, complaints were investigated, and appropriate measures were taken against the employees of the centers when cases contrary to the legislation were discovered (Dövlət Əmək Müfəttişliyi Xidməti, 2023, s. 1–2).

Since Karabakh is a region covering a large area, it is certainly not possible to solve this issue with just a few DOST centers and stations. Therefore, in June 2024, a branch of the Karabakh Regional DOST Center located in the city of Barda was opened in Shusha, the historical center of Karabakh. In connection with the intensification of the resettlement process, the implementation of such a con-

cept in Kalbajar also made access to social services a necessary issue. A DOST station was also established in the Kalbajar district of the Karabakh Regional DOST Center in September 2025 (DOST, 2025, s. 2). The Kalbajar district DOST station provides people returning to their ancestral homes with quick and easy access to social services provided by the state, as well as the implementation of social services for residents in accordance with the “single window” principle, based on fully transparent, modern prisms and in a form that meets the satisfaction of state citizens. This newly opened DOST station is expected to receive an average of 120 citizens per day (DOST, 2022a).

Another model of the DOST concept applied in Karabakh is the “Smart DOST” system. Less than 2 years after the 44-day war, on May 27, 2022 the “Smart DOST” service point of the DOST concept began operating in the Zangilan district of Karabakh (DOST, 2022a). The distinctive and innovative feature of this point is that citizens can benefit from more than 100 services online in the fields of labor, employment, social protection and social security. The service to citizens approaching the point is provided virtually by DOST agents through the online reception system. The fact that social services can be provided in a fully digital form in a post-conflict area like Karabakh was a first for Azerbaijan. Here, not only the DOST service is provided, but the village itself is also built on a smart system. The “Smart Village” pilot project covers the 1st, 2nd, and 3rd Aghaly villages of Zangilan. The project is being implemented mainly in 5 components: housing, production, social services, "smart agriculture" and alternative energy sectors. This project is the first of its kind to be implemented in the post-conflict period (Məmmədov, 2018, s. 128). The creation of infrastructure is very important for the implementation of social services at such a pace in a post-conflict area. Because the delay in access to social services can cause even greater problems. This term, which is called "Temporal gap" in the literature, expresses this. That is, normally, a 5–10-year time gap is usually needed to build infrastructure. However, the provision of services with this DOST model is perhaps one of the most important aspects of this model.

The Karabakh "DOST House" of the DOST Inclusive Development and Creativity Center also operates in the Karabakh Regional DOST Center in Barda. The working principle of "DOST House" differs significantly from the DOST Center and is more focused on the training skills of beneficiaries. They can freely establish their own businesses with the skills they acquire in this center. Currently, 33 beneficiaries are developing their skills in various training areas in the "DOST House" department (ƏƏSMN, 2025). Beneficiaries are provided not only with training here, but also with social, pedagogical and psychological support services.

A number of visits and events have been held between the two countries to implement the Azerbaijani DOST concept in Moldova. This shows that Azerbaijan has turned the DOST concept, which is a local product, into a model project for other countries. The DOST model is currently being implemented in Uzbekistan, which is considered a partner country. The first centers in the country have started to provide services to citizens. In the example of European countries, electronic support is being implemented in Romania and Serbia based on the DOST model.

Conclusions. The study focuses on the analysis of the ethical and digital transformation of public services through the application of the DOST concept in the social revival of post-conflict territories. Azerbaijan uses a post-conflict vacuum to bypass the middle stages of development in Karabakh and jump directly to Governance 4.0. It would be wrong to evaluate the DOST concept only as an ordinary social service center, because this concept is also a living model of the philosophy of social reconstruction. With this concept, the state forms high standards of innovation and transparency in social policy. Since the concept of serving people is based on the concept of DOST, this concept constitutes a practical manifestation of the state's "people-centered" management philosophy. The philosophy of the DOST concept, carrying a deep meaning, serves to fully ensure social rights and bring the state and citizens together at the closest point by overcoming lengthy bureaucratic obstacles between citizens and the state in a short and effective way.

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DOI https://doi.org/10.30525/2592-8813-2026-2-33

MÖMINƏ XATIN AS A METAPHYSICAL SYMBOL OF AZERBAIJANI FEMALE SUFISM: A HISTORICAL, ARCHITECTURAL, AND MYSTICAL ANALYSIS

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Abstract. This article examines Mömінə Xatın as a metaphysical symbol of Azerbaijani female Sufism through an interdisciplinary analysis combining historical, architectural, and mystical perspectives. Within the broader framework of Sufi philosophy, the feminine is conceptualized as a central metaphysical principle associated with divine love, illumination, and spiritual proximity. The study explores how this theoretical understanding is embodied in the figure of Mömінə Xatın, a prominent historical personality of the 12th-century Eldiguzid state, whose influence extended beyond political structures into the realm of moral and spiritual authority.

Particular attention is given to the Mömінə Xatın Mausoleum as an architectural manifestation of Sufi cosmology. Its geometric design, symbolic ornamentation, and spatial composition are interpreted as expressions of metaphysical concepts such as unity, transcendence, and the journey of the soul. Furthermore, the article introduces the notion of "silent Sufism" to describe Mömінə Xatın's non-textual spiritual legacy, which is conveyed through cultural memory, ethical influence, and symbolic continuity rather than written discourse.

The study concludes that Mömінə Xatın represents a unique synthesis of gender, spirituality, and cultural identity, demonstrating the enduring role of women as carriers of metaphysical meaning in Azerbaijani and Islamic intellectual traditions.

Key words: Sufism; Mömінə Xatın; feminine metaphysics; Islamic architecture; divine love; silent Sufism; Azerbaijani cultural heritage.

Introduction. Within the intellectual and spiritual history of Islamic civilization, Sufism represents not merely a religious movement but a profound metaphysical system that reinterprets the relationship between human beings, existence, and the Divine. It offers a holistic vision of reality in which the material and spiritual realms are deeply interconnected, and where the ultimate purpose of human existence is the attainment of divine knowledge and inner purification. Central to Sufi ontology is the notion that human value is not determined by gender, social hierarchy, or material status, but by spiritual realization (ma'rifa) and proximity to God (Quliyev, 2010). This perspective establishes a universal spiritual equality that transcends external distinctions and emphasizes the inner journey of the soul.

In this framework, the concept of woman transcends juridical and social limitations and becomes associated with divine qualities such as compassion, illumination, and love. The feminine is often symbolically linked with receptivity to divine grace and the manifestation of mercy, reflecting one of the essential attributes of God. This symbolic elevation of the feminine is not merely theoretical but finds expression in cultural, literary, and architectural forms across the Islamic world, where women are represented as both spiritual guides and metaphysical symbols.

One of the most compelling embodiments of this synthesis is the Mömінə Xatın Mausoleum in Nakhchivan, constructed in the 12th century. This monument is not only an architectural masterpiece but also a metaphysical text encoded in stone, reflecting the spiritual and symbolic role of a woman within the Azerbaijani Sufi worldview (Aliyev, 2002). Its design, ornamentation, and symbolic structure collectively convey a deeper philosophical narrative about life, death, and transcendence.

This article aims to analyze Mömінə Xatın as a metaphysical symbol of Azerbaijani female Sufism by integrating historical, architectural, and mystical perspectives, while also situating her legacy within the broader discourse of Islamic metaphysical thought.

Theoretical Framework: Sufism and the Concept of Woman

Sufism conceptualizes the human being as the vicegerent (khalifa) of God on Earth, whose essence lies beyond physical and gender distinctions. In classical Sufi metaphysics, the soul is inherently genderless, and spiritual realization is equally accessible to all (Ibn Arabi, 1946). This understanding reinforces the idea that the true identity of a human being is defined not by bodily form but by spiritual capacity and inner awareness.

Women in Sufi discourse are frequently associated with key metaphysical concepts such as Ishq (Divine Love), Nur (Divine Light), Ma'rifa (Gnosis), Fana (Annihilation of the ego), and Baqa (Subsistence in God). These associations elevate the feminine from a passive social role to an active metaphysical principle. The feminine becomes a symbol of receptivity to divine truth and a medium through which spiritual knowledge manifests.

This theoretical shift distinguishes Sufism from more rigid legalistic interpretations of Islam and allows for a more inclusive and universal spiritual anthropology, emphasizing inner transformation over external identity (Attar, 1961).

Discussion.

Female Spiritual Authority in Sufi Thought

The most prominent example of female spiritual authority in Sufism is Rābiʿa al-ʿAdawiyya, whose doctrine of unconditional divine love revolutionized Islamic spirituality. She rejected the dual motivations of fear (hell) and reward (paradise), asserting that true devotion must be grounded solely in love for God (Attar, 1961). In doing so, she introduced a radical reorientation of religious consciousness, shifting the focus from external compliance to inner sincerity and emotional purity. Her teachings emphasize that divine love is not transactional but absolute, requiring complete detachment from worldly expectations. This detachment (zuhd) was not merely ascetic withdrawal but an active cultivation of inner freedom, allowing the seeker to transcend ego-centered desires and attain proximity to the Divine.

Her famous prayer encapsulates this philosophy:

"If I worship You for fear of Hell, burn me in Hell… but if I worship You for Your own sake, do not withhold from me Your Eternal Beauty." This statement reflects a profound metaphysical understanding in which love becomes both the path and the *maqsad* (ultimate goal) of spiritual realization. It also anticipates later Sufi epistemology, where knowledge of God (*ma'rifa*) is attained not through rational inquiry alone but through experiential love and annihilation of the self (*fanāʾ*).

This perspective repositioned the woman not as a passive follower but as a creator of spiritual paradigms. Rābiʿa's legacy influenced major Sufi thinkers such as Ibn Arabi, who further developed the idea of the feminine as a locus of divine manifestation (Ibn Arabi, 1946). In his metaphysical framework, the feminine symbolizes receptivity and completeness, embodying the mirror through which divine beauty is revealed. Moreover, her thought contributed to the broader Sufi discourse on the unity of being (*waḥdat al-wujūd*) and the transformative power of love as an ontological principle.

Thus, within Sufism, women are not marginal figures but central actors in the construction of metaphysical knowledge, embodying both the experiential and theoretical dimensions of spiritual truth. Their contributions challenge conventional gender hierarchies and affirm the universality of spiritual potential, demonstrating that proximity to the Divine transcends social and biological distinctions.

Möminə Xatın lived during the 12th century as the wife of Shams al-Din Eldiguz, founder of the Eldiguzid (Atabeg) state, and the mother of Jahan Pahlavan, a prominent ruler. Historical sources portray her not merely as a political consort but as a moral and spiritual pillar within the ruling structure (Bunyadov, 1985). Her presence within the court reflects a model of leadership in which influence is exercised not through formal authority alone, but through ethical guidance and spiritual integrity, fostering a culture of justice, wisdom, and balanced governance. In this regard, she can be seen as embodying a form of "invisible authority," where legitimacy is derived from moral credibility rather than institutional power.

Her role exemplifies the Sufi concept of *zahir–batin* unity, where outward authority is balanced by inner spiritual depth. She functioned as a stabilizing force within the political sphere, ensuring that governance was aligned with ethical and spiritual principles. This dual role highlights her significance not only in political history but also in the metaphysical imagination of the period, where rulers were expected to embody both temporal power and spiritual responsibility, serving as both leaders and moral exemplars. Such a framework resonates with broader Islamic political thought, in which justice (*ʿadl*) is inseparable from spiritual consciousness.

Furthermore, Mömінə Xatın's influence can be interpreted through the lens of gendered authority in medieval Islamic societies, where women often exercised power through advisory, educational, and symbolic roles. Her example challenges reductive assumptions about female passivity, illustrating instead a dynamic participation in governance and intellectual culture. The construction of her mausoleum after her death signifies not only commemoration but also sanctification – transforming her memory into a lasting metaphysical presence. This architectural act reflects the medieval understanding of sacred space as a bridge between the temporal and the eternal.

In this sense, the monument serves as a symbolic extension of her spiritual authority, preserving her legacy within both historical consciousness and sacred space, while reinforcing her enduring influence across generations and cultural narratives. It also invites interpretation within the broader discourse of memory studies, where monuments function as carriers of collective identity and spiritual continuity.

The mausoleum was designed by the renowned architect Ajami Nakhchivani, one of the leading figures of medieval Islamic architecture (Kazimoglu, 2018). The structure embodies Sufi cosmology through its design elements: – Decagonal plan → symbolizes cosmic harmony

– Vertical elevation → represents spiritual ascent (sayr wa suluk) – Calligraphic inscriptions (Kufic and Naskh) → reflect dhikr (remembrance of God) – Ornamental rhythm → expresses divine order and unity

In addition to these features, the careful proportional balance of the structure reflects the mathematical precision often associated with Islamic metaphysical thought. The use of geometric patterns not only enhances aesthetic beauty but also serves as a visual representation of infinity and divine unity. Light and shadow interacting across the surface further reinforce the dynamic relationship between the visible and the invisible realms. The architectural composition transforms the mausoleum into a symbolic journey from the material to the spiritual realm. It is not merely a tomb but a metaphysical diagram of existence, where each structural element contributes to a deeper philosophical narrative about the unity of creation and the transcendence of the soul beyond physical limitations.

From a Sufi perspective, architecture can function as a medium of spiritual communication. The Mömінə Xatın Mausoleum exemplifies this by encoding metaphysical meanings into spatial and geometric forms. In this context, architecture is not merely a physical construct but a symbolic language through which abstract spiritual concepts are made perceptible. Each element of the structure participates in conveying a deeper ontological message about existence and transcendence, transforming the built environment into a site of contemplative experience.

The transition from horizontal stability to vertical expansion mirrors the Sufi path from worldly attachment to divine proximity. This vertical symbolism can be interpreted as an architectural representation of spiritual ascent (*miʿraj*), guiding the observer from multiplicity toward unity. The repetitive patterns evoke the infinite nature of God, while the inscriptions serve as a constant reminder of divine presence. Furthermore, the harmony between geometric precision and artistic ornamentation reflects the unity between *ʿaql* (intellect) and heart in Sufi epistemology, suggesting that true knowledge emerges from their integration rather than opposition.

Moreover, the spatial organization of the mausoleum encourages a phenomenological engagement, where the visitor becomes an active participant in the experience of meaning. Movement

through the space mirrors an inner journey, reinforcing the Sufi idea that external forms are reflections of internal realities. The interplay of light and shadow further enhances this dynamic, symbolizing the unveiling (*kashf*) of hidden truths.

Thus, the structure operates as a liminal space – a threshold between the temporal and the eternal. It represents the transformation of the physical body into spiritual permanence, guiding the observer toward contemplation, introspection, and an awareness of the eternal dimensions of existence beyond material reality. In this sense, the mausoleum is not only a monument of memory but also a pedagogical space that silently instructs the soul in the language of transcendence.

Unlike figures such as Rābiʿa al-ʿAdawiyya, Mömінə Xatın did not leave behind written mystical treatises or participate in formal Sufi circles. However, from a Sufi epistemological standpoint, silence does not negate spirituality. On the contrary, silence can be understood as a higher form of expression, where meaning is conveyed through presence, action, and inner state rather than articulated discourse. In many Sufi traditions, silence (*samt*) is associated with spiritual maturity, indicating a state in which truth is internalized rather than verbalized.

The principle of "the inward surpasses the outward" allows for the recognition of non-verbal forms of mysticism. Mömінə Xatın's spiritual legacy is expressed through:

– her role in shaping a moral-political environment;

– the symbolic meaning of her commemorative architecture;

– the enduring cultural memory associated with her name.

These dimensions reveal a form of spirituality embedded within lived experience rather than theoretical exposition. Her influence extends beyond her historical lifetime, becoming part of a collective metaphysical consciousness that continues to inspire cultural and spiritual reflection. This continuity aligns with Sufi notions of *baraka* (spiritual blessing), whereby the presence of a righteous individual radiates influence across time and space.

This can be described as "silent Sufism" – a mode of spiritual presence that manifests through action, environment, and symbolic continuity rather than textual production. It reflects an epistemology grounded in embodiment, where knowledge is lived rather than written, and where ethical conduct becomes a form of spiritual discourse. In this sense, Mömінə Xatın's legacy demonstrates that absence of textuality does not imply absence of depth, but rather points to an alternative, experiential mode of knowing rooted in being rather than saying.

The legacy of Mömінə Xatın continues into modern times as part of Azerbaijan's cultural and spiritual heritage. The restoration of her mausoleum by state initiative demonstrates the ongoing recognition of female contributions to national identity and spiritual history. This act of preservation is not merely an architectural intervention but also a symbolic reaffirmation of historical memory and cultural continuity across generations. It reflects a conscious engagement with the past, where heritage sites function as anchors of identity in an increasingly globalized world.

This continuity reflects a broader cultural pattern in which women are perceived not only as social actors but also as carriers of sacred meaning. Their roles extend beyond familial and societal functions into the realm of spiritual symbolism and metaphysical representation. In this sense, the Azerbaijani context preserves a unique synthesis of gender, spirituality, and cultural expression, where historical female figures are integrated into national narratives as embodiments of ethical and spiritual ideals.

Moreover, this enduring legacy contributes to contemporary discussions on gender and identity, offering a historical model in which feminine presence is associated with wisdom, moral authority, and spiritual depth. It challenges modern dichotomies between tradition and progress by demonstrating that historical paradigms can inform present-day discourses on inclusivity and representation.

Additionally, the preservation of such monuments underscores the importance of safeguarding both tangible and intangible heritage, ensuring that the philosophical, symbolic, and spiritual dimensions of figures like Mömінə Xatın remain accessible and meaningful. This process transforms

heritage into a living discourse, where past and present continuously interact, enriching both academic inquiry and collective cultural consciousness.

Conclusion. In Sufi thought, the feminine is not a marginal category but a central metaphysical principle associated with love, illumination, and divine proximity. This conceptual framework provided the intellectual foundation for the elevated status of women in medieval Azerbaijani culture. It also enabled a broader interpretation of spiritual authority, where inner virtue and metaphysical awareness were prioritized over external distinctions and social hierarchies.

Mömінə Xatın represents a unique embodiment of this tradition. While she did not produce written mystical works, her life, influence, and commemorative architecture position her as a powerful symbol of spiritual authority. Her legacy illustrates how spiritual presence can be expressed through lived experience and cultural memory rather than textual articulation.

The Mömінə Xatın Mausoleum stands as a testament to the enduring connection between material form and metaphysical meaning. It transforms memory into permanence and elevates the feminine into a universal symbol of divine love, while also serving as a lasting cultural and philosophical reference point that continues to inspire scholarly inquiry, artistic interpretation, and a deeper understanding of the intersection between gender, spirituality, and historical identity.

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DOI https://doi.org/10.30525/2592-8813-2026-2-34

NEW POLITICAL AND ECONOMIC REALITIES IN THE POST-CONFLICT SOUTH CAUCASUS

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Abstract. This article analyzes the political and economic transformations in the South Caucasus following the 2020 Karabakh conflict. It seeks to identify new regional dynamics and structural changes resulting from the shifting balance of power, particularly the growing influence of Azerbaijan and Turkey and the diminishing regional role of Russia. The study employs an interdisciplinary approach combining political realism and neo-institutional theory, as well as qualitative methods such as comparative analysis of official documents, event analysis, and content analysis. It examines the increasing polarization in Armenia's domestic politics, the strengthening of Azerbaijan's geopolitical position, and the growing importance of economic corridors and energy transit routes. Rather than viewing the region solely from a security studies perspective, the article aims to provide a comprehensive assessment of the political and economic aspects of the post-conflict order. This original contribution highlights the structural interdependence of political domestic changes and regional power realignments. The practical value of the study lies in its potential application for policy planning, the development of conflict resolution frameworks, and sustainable regional development strategies.

Key words: South Caucasus, post-conflict transformation, Karabakh, regional security, economic integration, political instability, geopolitical change.

Introduction. Even in the post-Soviet period, the South Caucasus remains an arena of acute conflicts, ethnopolitical contradictions, and the intersection of geopolitical interests of various global and regional players. The armed conflict that erupted in Nagorno-Karabakh in the fall of 2020 marked a turning point, changing not only the territorial and political landscape of the region but also triggering profound transformation processes within the participating states. These new realities require a comprehensive understanding, as they form the basis for future regional order, sustainability, and development.

The study utilizes comparative analysis, event analysis, content analysis of official documents, and elements of a systems approach to identify the interaction of external and internal factors. The main findings of the study include the identification of a new balance of power in the region, the strengthening of the role of Azerbaijan and Turkey, the weakening of Russia's position, and an analysis of socio-political instability in Armenia and Georgia's strategy of neutrality. The results of economic projects, such as the Zangezur Corridor, and the potential for energy transformation are also examined. The scientific novelty and originality of the article lies in its comprehensive assessment of the post-conflict situation not only in terms of military and political consequences but also through economic and institutional processes, enabling a more comprehensive scientific analysis of long-term risks and opportunities. The practical significance of the article lies in the potential application of the obtained results in the fields of foreign policy forecasting, regional security, conflict studies, and the development of international cooperation strategies.

The purpose of this study is to comprehensively analyze the political and economic changes in the South Caucasus in the post-conflict period, focusing on new configurations of regional and international relations, the internal transformation of the region's states, and prospects for sustainable development and integration.

The methodological framework incorporates a comprehensive approach based on the principles of political realism and neo-institutionalism.

Discussion and Results.

New Political Realities. Following the end of the armed conflict between Armenia and Azerbaijan in 2020, the South Caucasus found itself in a new political and economic dimension, where the traditional balance of power was disrupted and previous models of interaction between the countries of the region became ineffective. Azerbaijan's victory in the 44-day war and the subsequent signing of a trilateral agreement brokered by Russia marked a turning point in the region's history. For the first time since the early 1990s, control over a significant portion of Nagorno-Karabakh passed into the hands of Azerbaijan, which enjoyed full sovereign rights in the region. This, in addition to strengthening its position on the international stage, gave impetus to more active integration into regional and global economic processes.

The political situation in Armenia since the end of the conflict has been extremely unstable. The defeat led to an acute domestic political crisis, accompanied by mass protests, attempts to destabilize the situation, and a sharp decline in trust in the government. Although Nikol Pashinyan was re-elected in 2021, his legitimacy remains contested by a portion of society. Armenia's political landscape is characterized by growing polarization, complicating the implementation of foreign policy and economic reforms. Moreover, with Moscow's unstable support, dependence on Russia for security has led to a reconsideration of the Armenian elite's loyalty to the government.

Georgia, although not directly involved in the armed conflict, nonetheless felt its consequences. The growing influence of Turkey and Russia in the region, particularly amid escalating domestic political disputes and ongoing tensions in Abkhazia and South Ossetia, has also raised concerns in Tbilisi. Georgia's strategy toward the West has rapidly shifted, beginning to diverge from the West. Amid growing instability, its room for maneuver is shrinking, and relations with the West have entered a new phase of conflict.

The role of international actors has also changed significantly in the post-conflict period. Russia initially strengthened its presence in the region by brokering a ceasefire and deploying peacekeeping forces to Karabakh. However, subsequent developments, including Moscow's ambiguous stance in response to Azerbaijan's military operations, fueled discontent in Yerevan. This undermined traditional alliances and called into question Russia's role as a security guarantor. Following the Second Karabakh War, and especially with the withdrawal of Russian peacekeepers from Nagorno-Karabakh in 2025, Russia lost some of its traditional influence in the South Caucasus. Moscow has long been the hegemon in the region, operating within the framework of the theory of regional security complexes (Buzan and Waever, 2003), maintaining the status quo through its military-political presence, participation in conflict resolution, and institutional formats such as the CSTO and the EAEU. However, the transformation of the international situation, domestic challenges, and involvement in the conflict with Ukraine have led to a strategic redistribution of resources and a decrease in the flexibility of Russia's foreign policy behavior. From a scholarly perspective, this can be explained by the power-strain theory model proposed by Paul Kennedy (1987), according to which excessive external commitments, coupled with a weakening economic base, lead to a loss of influence on the periphery. This is precisely what is observed in the South Caucasus: domestic political and economic costs, sanctions pressure, and the need to maintain positions in other strategic regions (primarily Ukraine and Central Asia) have created a strategic burden for Russia. However, this does not mean that Russia is withdrawing from the region. Moscow is adapting its policy, shifting its emphasis from hard power to diplomatic maneuvering and economic intervention, particularly in its bilateral relations with Azerbaijan. Russia is attempting to maintain its balancing role by relying on the following levers:

- Energy cooperation (e.g., gas supplies, participation in infrastructure construction);
- Logistics corridors (North-South, Russian control of railways);

• Military-technical cooperation with Baku;
• Influencing Armenia's domestic politics through the pro-Russian elite and the information space.

Armenia, in turn, is reassessing its alliance commitments, questioning the effectiveness of the CSTO and intensifying engagement with the EU, France, and Iran. Russia perceives this as a challenge to the structure of post-Soviet loyalty, which can be interpreted in terms of the sociological legitimacy of alliances (Holsti, 1970): when an alliance ceases to meet basic security expectations, an ally naturally seeks an alternative. From a geopolitical realist perspective (Mearsheimer, 2001), Russia will seek to minimize losses and prevent the South Caucasus from shifting toward the West and China. However, given its limited resources, Moscow is unlikely to be able to restore its previous level of dominance. A transition to a fragmented model of influence is likely, in which Russia will act purposefully: economically in Azerbaijan, politically in Armenia, and strategically in Georgia. This influence is expected to be maintained through the containment and instrumentalization of separatist enclaves (Abkhazia, South Ossetia). Thus, Russia's position in the post-conflict architecture of the South Caucasus will be transformed: from a hegemon to one of the external players competing in a multipolar model. Moscow retains its influence, but no longer as a monopolistic security provider, but as an adaptive player in the face of external pressure and internal structural contraction.

Turkey, by contrast, has expanded its influence not only in Azerbaijan but also in the South Caucasus as a whole, demonstrating an active and effective foreign policy. Economic and military support for Baku has strengthened Ankara's position, transforming it into a full-fledged regional player. Following the Second Karabakh War and subsequent changes in the regional security architecture, the South Caucasus has become an area of growing influence for foreign players: Turkey, Iran, and the United States. Building on ethnocultural ties with Azerbaijan and seeking to establish a leading position in the region, Turkey is developing its military and economic presence in the region. Active participation in transport corridors such as the Baku-Tbilisi-Kars route contributes to strengthening its strategic influence, consistent with the concept of regional security complexes, in which Turkey acts as a key factor in the balance of power in the region (Buzan, Wäver, 2003). Iran, given its complex ethnic and religious relations with the peoples of the Caucasus, simultaneously seeks to avoid the growing influence of the United States and Turkey, maintaining its position as a balancing factor. Iran's policy is based on a pragmatic geopolitical approach and a combination of soft power - cultural and religious ties and economic cooperation - which serve as a means of preventing regional hegemony within the framework of balance-of-power theory (Mearsheimer, 2001). The United States views the South Caucasus as a strategically important region for controlling transportation routes and limiting the influence of rivals such as Russia and China. Promoting democracy, human rights, and economic reform through soft power instruments is consistent with the concept of the US national role as a global policeman (Holsti, 1970). Supporting the Euro-Atlantic aspirations of Georgia and Armenia, as well as strengthening defense ties with Azerbaijan, are part of America's preventive strategy. Thus, a multipolar regional security complex is emerging in the South Caucasus, where the interests of Turkey, Iran, and the United States are intertwined in a dynamic system of cooperation and competition. These processes demonstrate the region's transition to a new configuration of international relations, characterized by multiple centers of influence and the absence of the unambiguous dominance of a single power. A theoretical framework based on regional security complexes (Buzan, Wawer), balance-of-power theory (Mersheimer), and the national role of states (Holsti) helps explain the complexity and multidimensionality of the interactions between external actors in the post-conflict South Caucasus.

In parallel, the European Union has stepped up diplomatic activity in the region, offering mediation in peace talks and assistance in rebuilding infrastructure. However, limited leverage and the lack of a military component prevent the EU from playing a decisive role in ensuring security. Azerbaijan is categorically dissatisfied with the activities of this observer mission and demands that monitoring

of Azerbaijani territories be coordinated with official Baku. In May 2025, the observer missions in Armenia and Georgia reached an agreement on joint cooperation. From an academic and analytical perspective, the signing of an administrative agreement between the EU missions in Armenia and Georgia can be viewed as an element of regional integration and institutional cooperation within the framework of the European Union's Common Security and Defense Policy (CSDP). The EU, as an international actor, sends civilian and military missions to stabilize peripheral zones, especially in the context of potential escalation or "frozen" conflicts, such as the Karabakh issue and tensions on the Russian-Georgian border. According to neo-institutionalist (Keohane, 1984) and regional security theory (Buzan and Wæver, 2003), such agreements represent mechanisms of sustainable coordination and trust. They help reduce transaction costs in interactions between international structures, especially in the context of the multi-layered security of the South Caucasus. Moreover, the agreement demonstrates the EU's attempt to strengthen "operational synergies" between the various missions. This is especially important given the limited mandate of each of them. Cooperation in emergency situations (emergency response) indicates an attempt to create early warning systems consistent with modern approaches to "preventive diplomacy" (Boutros-Ghali, 1992). The signing of the agreement should also be viewed in the context of intensifying competition between the West and Russia in the region. EU missions in the South Caucasus have become more active since the Second Karabakh War (2020), especially amid growing dissatisfaction in Yerevan with the actions of the CSTO and Russia. Therefore, the cooperation agreement between the EU missions in Armenia and Georgia is not only an administrative act but also a geopolitical signal: Brussels is attempting to strengthen its presence in a region traditionally considered Russia's sphere of influence.

New Economic Realities. Following the Second Karabakh War in 2020 and the subsequent withdrawal of Russian peacekeepers from Nagorno-Karabakh (2025), the South Caucasus is undergoing a systematic transition from a polar configuration dominated by Russia to a more multipolar model with an increasing role for players such as the European Union, Turkey, Iran, and China. Following the Second Karabakh War and the subsequent changes in the region's political architecture, the South Caucasus has found itself at the epicenter of both political and economic tectonic shifts. Russia's focus on Ukraine and the gradual weakening of its influence due to the declining prestige of the CSTO have led countries in the region to reorient their foreign policy and economic vectors. Against this backdrop, the role of foreign players not directly involved in regional conflicts but capable of offering significant resources and alternative development paths is increasing. One such player is the People's Republic of China. China operates in the region with restraint, without overt political pressure, preferring a strategy of economic growth through infrastructure projects, trade initiatives, and long-term investments. In the context of post-conflict restructuring, as Azerbaijan seeks to strengthen its transport position, Georgia seeks to improve its transit status, and Armenia seeks to rethink its external dependence, China's involvement is particularly relevant. The region is becoming an important part of the Middle Corridor of the Belt and Road Initiative (BRI), which connects China with Europe via the Caspian Sea, the South Caucasus, and Turkey, bypassing Russia. Azerbaijan and Georgia are actively integrating into this logistics model. The Port of Baku, the Baku-Tbilisi-Kars railway, and Georgian infrastructure directly and indirectly receive support from Chinese contractors, banks, and investors. Armenia, for its part, is interested in expanding economic ties with China amid cooling relations with Russia and the search for new foreign economic support. The Chinese model differs from the Western one in that it lacks political conditionality: it entails loans, construction, and investment without adherence to democratic reforms and governance standards. This makes it particularly attractive for states undergoing post-conflict restructuring, where internal political sovereignty and a flexible economic strategy are key priorities. At the same time, China maintains neutrality in territorial disputes and ethnopolitical conflicts, which benefits all parties. China offers the countries of the South Caucasus not only capital but also access to global markets, technology chains, and large-scale infrastructure projects. This strategy, based on pragmatism and non-interference,

allows China to build sustainable geoeconomic influence without becoming embroiled in regional disputes or occupying vacant spaces previously controlled by Russia. Moreover, through bilateral cooperation mechanisms and participation in multilateral formats, China is gradually becoming a countervailing force capable of exerting a stabilizing influence amid growing competition between the West, Turkey, and Iran, and Russia's residual influence. Thus, China is acting not as a classic power broker in the new political and economic realities of the South Caucasus, but as a strategic architect of alternative development paths. Its role is not expansion in the traditional sense, but rather integration into the regional economy through logistical, financial, and technological solutions. In the coming years, this strategy could play a decisive role in the stability of the South Caucasus.

The economic reality of the South Caucasus in the post-conflict period is shaped by several key trends. First, the importance of regional logistics and transport corridors is growing. The Zangezur Corridor project, aimed at connecting mainland Azerbaijan with Nakhchivan via southern Armenia, could radically alter the regional communications map, simultaneously strengthening economic ties and sparking political disputes, particularly in Yerevan. Second, Azerbaijan has strengthened its position as a major energy supplier to Europe, which is particularly relevant in the context of the global energy crisis and the EU's attempts to diversify its oil and gas sources. This creates new opportunities for Baku to expand its influence, including through participation in projects to build new pipelines and expand existing routes. At the same time, the restoration of Karabakh's devastated infrastructure requires significant investment. Azerbaijan has announced large-scale programs to build roads, cities, and social infrastructure, but this process is fraught with numerous challenges, ranging from environmental issues to humanitarian ones, including mine clearance and the return of refugees. The success of the restoration will largely determine the prospects for long-term stability in the region.

The success of the restoration will largely determine the prospects for long-term stability in the region. Thus, the South Caucasus has entered a phase of transformation, where previous forms of interaction are giving way to new models shaped by changing power relations, the interests of external actors, and internal social processes. In the post-conflict period, the region is at a crossroads – a choice between escalation and opportunities for sustainable development, political vendetta and pragmatic cooperation. The choices the South Caucasus states make in the coming years will determine not only their internal stability but the fate of the entire region.

Following the end of the Second Karabakh War in 2020, the South Caucasus entered a qualitatively new stage of its development, and at this stage, it became clear that political and economic factors are closely interrelated. The change in the status quo in Nagorno-Karabakh, where Azerbaijan regained control over a significant portion of previously lost territories, became the starting point for a new regional security architecture. Although the Russia-brokered agreement of November 10, 2020, established a temporary ceasefire, deep-rooted differences between the parties remained unresolved (De Waal, 2013). Politically, Azerbaijan emerged from the conflict as a strengthened state with increased influence both regionally and internationally. The successful restoration of territorial integrity became an important element of national identity and legitimacy (Cornell, 2017). In contrast, Armenia entered a period of severe political instability. Growing public discontent, weakening trust in the government, and internal polarization became characteristic features of post-war Armenia. The Armenian government faced the need to balance public pressure, foreign policy reassessment, and national security challenges.

Russia's role, traditionally viewed as a regional security guarantor, has been ambiguous in the post-conflict period. On the one hand, Moscow brokered a ceasefire and deployed a peacekeeping force to Karabakh. On the other hand, its inability to prevent further escalation and its ambiguous stance in the subsequent clashes between Baku and Yerevan have diminished its prestige, particularly in Armenian society (International Crisis Group, 2022). Turkey, on the other hand, has increased its

influence by providing political and military support to Azerbaijan. The Turkish-Azerbaijani alliance has strengthened, posing a challenge not only to Armenia but also to Russia's traditional influence in the region. Furthermore, Turkey has begun actively promoting transportation initiatives, including discussions of the Zangezur Corridor – a potential infrastructure project that could radically alter logistics in the South Caucasus. Georgia, which remains neutral in the conflict, finds itself in a difficult position. On the one hand, the region continues its path toward Euro-Atlantic integration and maintains its status as a transit hub. On the other hand, growing instability and intensifying security challenges in the region require Tbilisi to pursue a more flexible and multi-vector foreign policy. The economic aspects of the post-conflict period include the need to rebuild the devastated territories of Karabakh, build new infrastructure, and possibly reroute regional trade and energy routes. These processes could both deepen the interdependence of the region's countries and intensify competition for influence among external players. Thus, the post-conflict South Caucasus represents a space of growing geopolitical contradictions and new opportunities, requiring a balanced approach, proactive diplomacy, and the participation of international institutions.

Conclusions. The post-conflict period in the South Caucasus is a complex and multidimensional process, requiring a comprehensive and interdisciplinary approach to analyzing the region's political and economic realities. The study identifies key trends related to the strengthening regional influence of Azerbaijan, political instability in Armenia, and the changing role of external players such as Russia and Türkiye. Economic recovery and the development of transport corridors open up new opportunities, but at the same time create challenges that require joint efforts to ensure lasting peace and cooperation.

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DOI https://doi.org/10.30525/2592-8813-2026-2-35

BEYOND SOFT POWER: THE TRANSFORMATION OF SINO-THAI DIPLOMATIC RELATIONS

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Abstract. This article explores the PRC's strategy of transitioning the foreign policy stance of Thailand from that of a traditional U.S. security partner toward a more China-aligned orientation. The methodological framework is grounded in the structuralist paradigm of international relations, utilizing the concept of «weaponized interdependence», alongside an analytical approach that includes content, institutional, and trend analysis. The study concludes that the PRC's approach to gaining leverage over Thailand does not rely solely on soft or hard power; rather, China constructs «nodes» of asymmetrical dependence through informal relations with high-ranking officials to establish a neopatrimonial system. Consequently, political stakeholders prefer the pragmatic preservation of existing ties over confrontational policies toward the PRC, which in turn limits engagement with third-party states. Prospects for further research include examining this pattern in other regional states, as well as exploring the negative consequences of such strategies for China's broader soft power.

Key words: Thailand-PRC partnership, ASEAN, asymmetrical dependence, neopatrimonialism, foreign policy alignment, panda diplomacy.

Introduction. Research into the foreign policy instruments utilized by great powers to secure national interests and shift the regional balance of power remains central to the metatheoretical debate in international relations. Both scientific ambiguity and the political exigencies of current geopolitical contestation underscore the relevance of this study. Thailand serves as a cogent case study, given Bangkok's transition from a traditional U.S. security partner toward a more China-aligned stance. Furthermore, Thailand's foreign policy carries significant weight due to its status as one of the four principal ASEAN powers. Should Thailand shift its strategic alignment toward China, it would likely alter the regional power balance and reinforce broader geopolitical trends.

The purpose of this article is to identify the primary instruments of Chinese foreign policy directed toward Thailand and to trace the resulting shifts in regional influence.

Literature Review. Professor Kerry K. Gershaneck, a visiting scholar at the Graduate Institute of East Asian Studies at National Chengchi University and a former U.S. Marine Corps officer, previously served as a distinguished visiting professor at the Chulachomklao Royal Military Academy in Thailand, a senior research associate with the Center for International Affairs at Thammasat University. His book, *Political Warfare: Strategies for Combating China's Plan to «Win Without Fighting»* (Gershaneck, 2020), provides firsthand observations on Thai-Sino relations from a deeply

informed analytical perspective, offering significant insights into the application of these strategies within the domain of military contention.

Gregory Raymond, an Associate Professor in the Strategic and Defence Studies Centre at the Coral Bell School of Asia Pacific Affairs, specializes in Southeast Asian politics, defense, and foreign relations. In his 2024 article, *Explaining 'Grey Capital': The Sociology of Transnational Chinese Companies and Crime in Thailand* (Raymond, 2025), Raymond analyzes Thai-Chinese relations through the lens of commercial networks that may align with state political interests. Utilizing a cross-border sociological approach, the study traces the development of informal interstate relationships and the growing proximity between state actors and business interests.

Chonlawit Sirikupt, a PhD candidate in political science at the Eberhard Karls Universität Tübingen, explores these dynamics in his 2025 paper, *China Index Spotlight: As Close as One Family? Examining PRC's Influence in Thailand* (Sirikupt, 2025). This research provides a multidimensional examination of Chinese influence over Thailand, systematically categorizing various PRC initiatives and diplomatic efforts within a single analytical framework.

Methods. The methodological framework of this study is grounded in the structuralist paradigm of international relations. To investigate these dynamics, the research utilizes a multi-dimensional analytical approach: content analysis of historical archives, official communiqués, and public statements from high-level foreign policy officials to reconstruct discourse and delineate the strategic priorities of state actors; institutional analysis to evaluate the efficacy and functions of the organizations governing Thai-Sino relations; and trend analysis to map policy shifts catalyzed by Chinese initiatives within the regional geopolitical landscape.

Main results of research. In his 1991 Foreign Affairs article, «*America in Asia: Emerging Architecture for a Pacific Community*», then-Secretary of State James A. Baker III articulated a U.S. vision for further integrating ASEAN member states into a Western-oriented framework. His logic was predicated on the post-Vietnam War era, during which the United States feared that Thailand, Malaysia, and Indonesia would succumb to the communist bloc, as posited by the domino theory. Instead, the inverse occurred: Baker noted that «ASEAN today is America's fifth largest trading partner, rivaling U.S. commerce with Germany; and America is ASEAN's largest export market». Consequently, trade was identified as the primary mechanism for political alignment. Baker further referenced President George H.W. Bush's June 1991 address at Yale University, in which the President observed that there was no historical precedent for a nation successfully «importing the world's goods and services while stopping foreign ideas at the border».

Emphasizing economic ties, Baker noted that «the United States exports more to Thailand than to the Soviet Union» and identified APEC as «the hallmark of American engagement in the region, as are U.S. security ties». Baker envisioned a 21st-century Southeast Asia modeled on 19th-century American development, in which infrastructure and telecommunications would serve as the veins of economic and political rapprochement. Consequently, he argued that Southeast Asia was poised to transition toward a Western model of «democracy and market-oriented economics» (Baker, 1991).

However, the promising trajectory of U.S.-ASEAN relations, including those between Thailand and the United States, was subsequently overshadowed by Chinese advancements in domains once prioritized by Washington as principal. China is currently Thailand's leading trading partner in terms of imports (approximately $107 billion) and the primary source of Thailand's trade deficit (approximately $67 billion), with figures substantially higher than previous year. Meanwhile, the United States, originally conceptualized as an exporter of democratic values alongside goods, now primarily serves as the largest destination for Thai exports (Thailand's Trade Statistic Report System...).

A financial turning point in Thai-American relations occurred during the 1997 Asian financial crisis, which originated in Thailand and severely destabilized the economies of other founding ASEAN nations, particularly Malaysia and Indonesia. While it remains a subject of retrospective analysis,

Janet Yellen's tenure as President of the Federal Reserve Bank of San Francisco (frequently characterized as the Federal Reserve's «window to Asia») was likely shaped by the intense criticism the United States faced during the crisis, specifically regarding its initial reluctance to contribute to the international rescue package for Thailand (Cassetta, 2022). Simultaneously, the Chinese government proposed an unconditional aid package (initially promised at 1 billion USD, though never fully delivered) which significantly improved China's public image in Thailand (Gershaneck, 2020).

Concurrently, the People's Republic of China developed channels to bridge the political and military distance with Thailand. Deng Xiaoping, then-Chairman of the Central Military Commission established and maintained a strategic rapport with his Thai counterpart General Chavalit Yongchaiyudh, meeting in the late 1980s in Beijing to solidify military cooperation. Following the establishment of this connection, bilateral military relations intensified, characterized by later regular joint exercises and ongoing collaboration.

A high-ranking Chinese officer proposed the creation of a non-governmental body to serve as a streamlined conduit for dialogue. General Chavalit facilitated the legal incorporation of this organization in Thailand and served as its inaugural president.

Thai-Chinese Cultural and Economic Association (TCCEA) proclaims its primary accomplishment to be «serving as the most efficient bridge for strengthening relations between the Royal Thai Armed Forces and the People's Liberation Army, as well as fostering cooperation in military, security, and defense force development». Its secondary stated achievement is the conclusion of the panda-lending agreement. Furthermore, the Association facilitates sister-city relationships between Thai and Chinese provinces, including Phuket and Yantai, Sukhothai and Shaanxi, and Prachinburi and Changchun. Currently, the Association's membership exceeds 660 individuals (**เกียวกับสมาคม**…).

The election of Prime Minister Thaksin Shinawatra in 2001, who was born into a prominent Sino-Thai family, significantly accelerated Thailand's strategic pivot toward Beijing, reinforcing a foreign policy vector characterized by deepened economic integration and heightened political alignment. In his cabinet, Chavalit Yongchaiyudh was appointed Minister of Defense and Deputy Prime Minister. He became the first Defense Minister under whose tenure joint military exercises with the PRC were conducted; Thailand served as China's inaugural partner for such exercises in the region.

In 2001, Chavalit Yongchaiyudh visited China to meet with PRC President Jiang Zemin, personally requesting the loan of a pair of giant pandas for Thailand. By that time, modern «panda diplomacy» (which originated with President Nixon's 1971 visit to Beijing and evolved into high-cost, 10-year leasing agreements) was primarily extended to major economies, including the United States, the United Kingdom, Japan, and the Republic of Korea. Thailand's request was notable, as the country was not only a developing economy but was still experiencing the protracted consequences of the 1997 Asian financial crisis, with a GDP that remained below pre-crisis levels and a creditworthiness ranking that had plummeted from 32nd to 51th (Hamlin, 2001).

Nevertheless, on October 12, 2003, Thailand became the first nation in Southeast Asia to host giant pandas, Chuang Chuang and Lin Hui, on long-term loan. (Years later, Malaysia, Singapore, and Indonesia also received pandas from China.) It is significant to note the selected location: Thailand established the exhibit not in the capital, where visitor volume would have been maximized, but in the northern region, which maintains a higher density of the Chinese diaspora. Notably, this region was also the birthplace of Prime Minister Thaksin Shinawatra and the political power base of then-Deputy Prime Minister Chavalit Yongchaiyudh (Hohnholz, 2009).

Furthermore, to construct a high-standard facility covering four rai of exhibition space, the government allocated 39 818 313 THB (approximately 926 000 USD at the time) from its emergency contingency fund, with construction executed by the Royal Thai Army Corps of Engineers (**ความเป็นมา**).

The evidence presented suggests that the primary accomplishments claimed by the Thai-Chinese Cultural and Economic Association were achieved during the initial years of the political tandem

of Thaksin Shinawatra and Chavalit Yongchaiyudh. Both joint military exercises and «panda diplomacy» were inaugurated during their tenure, establishing the foundation for the subsequent expansion of Thai-Sino relations.

By 2004, Thai-Sino ties had expanded to include joint consultations on internal security matters. Critics have argued that this facilitated the transfer of Chinese methodologies regarding the suppression of political dissent, which the Thai government subsequently employed in its approach to the separatist insurgency in the country's Islam southern provinces.

In 2005, China's presence in the Thai media landscape expanded with the launch of an English-language edition of the China Daily, augmenting the long-standing operations of the state-run news agency Xinhua, which has been active in Thailand since 1975. China's influence in the domestic information space was further solidified through financial incentives directed toward pro-Beijing media outlets, alongside the strategic withholding of advertising revenue from Thai media organizations perceived as skeptical of Chinese policy (Gershaneck, 2020).

Meanwhile, the Confucius Institute network expanded at an unprecedented pace, eventually establishing a presence in Thailand that surpassed the combined total of such centers in neighboring nations. As of July 2025, this infrastructure comprises 16 active Confucius Institutes and 21 Confucius Classrooms integrated into the local education system (Sirikupt, 2025).

Following the 2006 political crisis that challenged the administration of Prime Minister Thaksin Shinawatra, the Chinese Embassy remained confident that its influence in Thailand was sufficiently robust to withstand domestic volatility. This assessment was predicated on Beijing's perception of an irreversible trend characterized by deepening «growing commercial links, cultural ties, collegial diplomatic relations, and growing military cooperation programs» (Sirikupt, 2025).

The adoption of a new constitution and the holding of elections provided the United States with an opportunity to reverse the strategic shifts instituted by the Thaksin-Chavalit political tandem. However, in the post-coup environment, a pro-U.S. orientation failed to take root. By 2010, a Congressional Research Service (CRS) report stated that «the [U.S.–Thailand] alliance, while institutionally sound, suffers from a lack of strategic alignment». The report further noted that «many analysts saw the suspension of several U.S. military programs following the coup as an opportunity for China to expand its influence in the Thai defense establishment» (Chanlett-Avery, 2010). This stalemate, arising from the U.S. dilemma between advocating for democratic governance and maintaining security ties, was not successfully resolved, and similar challenges persisted during subsequent political crises.

In May 2014, following a military coup d'état, the second such intervention in eight years, Thailand's strategic orientation shifted even more decisively toward Beijing. As the United States adopted a hesitant approach to maintaining existing diplomatic relations, China recognized a strategic opening to further consolidate bilateral ties. Washington initially relied on the perceived pro-Western orientation of King Bhumibol Adulyadej (Rama IX) to maintain stability in the relationship (US embassy cables); however, the King's death in 2016 removed this pillar of support. His successor, Maha Vajiralongkorn (Rama X), has demonstrated neither a strong interest in international politics nor an inclination to prioritize the U.S.-Thai security partnership (Hollister, 2025).

By 2017, Thailand reached an agreement to procure the S-26T Yuan-class submarine from China (a transaction that would have been considered improbable in 2012 due to concerns regarding the quality of Chinese naval hardware and potential amount of necessary spendings. Previously, Thailand had explored the acquisition of six refurbished German submarines, but these negotiations were ultimately abandoned due to excessive projected expenditures.

The 2017 procurement agreement for the S-26T Yuan-class submarine included an option to acquire two additional vessels. When the Thai government moved to exercise this option, it faced significant domestic pushback; the Thai public widely questioned the necessity of an $800 million expenditure on major naval weaponry in the absence of an immediate or existential maritime threat.

Furthermore, the project encountered a critical impasse in 2022 when Germany reaffirmed its strict export limitations toward China, specifically regarding the MTU-396 diesel engines originally specified for the S-26T (Abuza, 2022). As Beijing could not fulfill the contract with the German-made components, it proposed several alternatives, all of which were initially rejected by Bangkok. The stalemate was eventually resolved when both sides reached an agreement to integrate a domestic Chinese engine, the CHD620, into the vessel, with an anticipated delivery timeframe set for 2028 (Chuanren, 2025).

Concurrently, interest in the Kra Canal project, perceived by Beijing as a vital mechanism to mitigate the «Malacca Dilemma» rather than as a primary economic necessity for Thailand, gained renewed momentum in 2015. From an economic perspective, the proposed Kra Canal remains a mega-project characterized by significant uncertainty regarding its return on investment, as it would reduce transit times between the Indian and Pacific Oceans by only a few days. By contrast, the Panama and Suez Canals offer logistical savings of several weeks. Despite these concerns, the Thai-Chinese Cultural and Economic Association (TCCEA) and the Thai-Chinese Association for Sustainable Development (TCASD) remain among the project's most prominent proponents in Thailand. Both organizations frequently frame the canal as a potential maritime corridor within the broader Belt and Road Initiative (BRI). This alignment is consistent with the strategic vision of former Deputy Prime Minister and Minister of Defense Chavalit Yongchaiyudh, who actively championed the Kra Canal as a key initiative for stimulating the Thai economy in the mid-2000s (Storey, 2019).

Conversely, major multinational military exercises led by the United States have persisted, albeit with modified objectives. Cobra Gold, first established in 1982, has expanded to become the largest U.S.-led multinational exercise in Asia hosted by Thailand. While these exercises have not been discontinued, their operational focus has gradually shifted from high-intensity combat scenarios involving a near-peer competitor toward humanitarian assistance and disaster relief (Ryoo, 2026).

In 2023, following the death of Lin Hui, the last of the giant pandas loaned to Thailand in 2003, the Thai government initiated efforts to secure a new pair of giant pandas to serve as diplomatic goodwill ambassadors. The acquisition of these animals is treated as a high-level diplomatic priority, often featuring prominently in discussions between the Prime Minister and cabinet members. This level of state engagement is reflected in media reporting, which frequently documents the Prime Minister's direct involvement in lobbying Chinese officials and overseeing the logistics of potential loan agreements, including the selection of host zoological institutions.

Jatuporn Buruspat, formerly the Permanent Secretary of the Ministry of Natural Resources and Environment, recently confirmed that the arrival of a new panda pair is anticipated by 2027. He noted that the delay is primarily due to the necessity of upgrading hosting facilities to meet current international standards, thereby ensuring Thailand remains competitive with regional counterparts such as Malaysia and Indonesia. According to official reports, China has expressed satisfaction with Thailand's previous stewardship of the species, citing the pandas' 20-year lifespan in Chiang Mai as a benchmark that exceeds the species' average in captivity (**อดใจรอ! "แพนด้ายักษ์" คู่ใหม่ถึงไทยปี** 70, 2024).

However, similar to the submarine procurement, public opinion has increasingly questioned the fiscal rationale for these expenditures. The Office of the Auditor General of Thailand estimates that the government spent 98 million THB between 2002 and 2022 on the construction and development of research facilities at the Chiang Mai Zoo (**ดีใจมัย! ไทยจะมี**…, 2025); this figure excludes the cost of the panda loan itself, which averages approximately 1 million USD annually. Thailand's efforts to safeguard giant pandas have arguably sidelined the conservation of its own native species, the Asian elephant. This concern has catalyzed a movement advocating for the redirection of these funds toward the preservation of Thai elephants, both within the country and throughout their regional habitats (Opponents of panda diplomacy…, 2024).

These cases suggest that high-level government cooperation between Thailand and China frequently ignores legitimate public concerns. Furthermore, even «panda diplomacy», often regarded as a soft-power tool to cultivate global sympathy toward the People's Republic of China, faces domestic backlash when such cooperation is prioritized over national interests. This pattern is also evident internationally. For instance, in New York, Congresswoman Carolyn Maloney's long-standing campaign to secure a giant panda loan for a local zoo ended unsuccessfully; she was ultimately defeated by a candidate who supported the «No to Pandas in Captivity» movement (Moss, 2022), and public fundraising for the initiative ceased well before the necessary capital was secured. Similarly, in 2024, Finland prematurely terminated its panda loan program, citing economic constraints and shifting priorities.

However, China's long-term diplomatic efforts have significantly influenced regional policy stakeholders, following a pattern observable both in Thailand and across Southeast Asia. According to The State of Southeast Asia: 2026 Survey Report, published by the ISEAS-Yusof Ishak Institute (Lin, J. et al., 2026) and polling over 2,000 regional experts from academia, the private sector, civil society, media, and government, China is recognized by 55.9% of respondents as the most influential economic power in Southeast Asia, while only 13.2% identified ASEAN as the primary economic influence (Lin, J. et al., 2026: 37). Data from 2025 to 2026 indicate a shift in regional sentiment: respondents have become increasingly concerned regarding U.S. economic influence, while welcoming China's economic presence with greater frequency.

When asked, «If ASEAN were forced to align itself with one of the strategic rivals, which should it choose?», a majority of respondents from all panda-hosting ASEAN nations selected China over the United States. Furthermore, these nations generally anticipate that their bilateral relations with the PRC will improve or remain stable; Indonesia notably ranks as the second most optimistic nation in ASEAN regarding these relations, trailing only Bangladesh (Lin, J. et al., 2026: 51). Regarding the question of whether China will «do the right thing» to contribute to global peace, security, prosperity, and governance, approximately 30% of respondents expressed confidence. Within this subset, Thailand reported the highest percentage (14.4%) of respondents citing admiration for Chinese culture as a primary basis for trust, although the majority of respondents across the region attributed their trust primarily to China's economic influence and its political ambition to act as a global leader (Lin, J. et al., 2026: 61). Notably, cultural incompatibility remains a low-ranked driver of distrust; this trend is consistent across all ASEAN nations, not merely those participating in «panda diplomacy».

Discussions. This demonstrates that China's projection of economic power and its ambition to achieve superpower status secure more pragmatic support than isolated soft-power initiatives. As James A. Baker forecasted, trade and investment have played a significant role in political alignment, even as Chinese manufacturing output has increasingly outpaced U.S. exports. Prospects for further research include examining whether soft power is losing its relevance in foreign policy decision-making, as well as exploring how the management of expectations and future projections influence the motives of current decision-makers.

Conclusions. The PRC's approach to gaining leverage over Thailand does not rely solely on soft power (such as «panda diplomacy», Confucius Institutes, and media presence) or hard power. Rather, China constructs integral «nodes», leveraging Thailand's asymmetrical dependence. Military hardware acquisitions, trade imbalances, and pro-China media and cultural engagement evolve into a network resilient to political turbulence.

The flow of these influences begins with formal, and subsequently informal, relations among a select group of high-ranking officials who facilitate the diffusion of Chinese influence. Through their support, China establishes a neopatrimonial system in which personal connections carry more weight than official rankings. In such an environment, the national interests of the state are transformed by the personal interests of public officials.

The subsequent phase involves establishing institutions to solidify this network, comprising a limited circle of influential individuals. Although this strategy eventually triggers public backlash, it creates a solidified foundation of asymmetrical dependence that cannot be easily reversed. Consequently, political stakeholders prefer the pragmatic preservation of existing relations over the adoption of a confrontational policy toward the PRC.

This strategy is observed not only in Thailand but among other regional and global actors, suggesting that the United States can no longer rely solely on soft power and trade ties, instruments that lack security within a neopatrimonial system. Moreover, the dilemma of how to advocate for democratic values in authoritarian states remains unresolved. This ongoing challenge forces Washington to confront the prospect of gradually losing allies, as is currently occurring in its relationship with Bangkok.

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DOI https://doi.org/10.30525/2592-8813-2026-2-36

THE THIRTY YEARS' WAR (1618–1648): CLIMATIC CONTEXT, GEOPOLITICAL CONSEQUENCES AND THE MATERIAL CULTURE OF THE AGE

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Abstract. This article is devoted to a comprehensive study of the Thirty Years' War (1618–1648) – the bloodiest armed conflict of early modern Europe – across several interrelated dimensions: geopolitical, climatic, and cultural-material. The key phases of the conflict, its participants, and long-term consequences are examined – from the Peace of Westphalia to post-war instability. Particular attention is paid to the role of the climatic factor – the cold depression of the Maunder Minimum – in deepening the humanitarian catastrophe. The influence of extreme winters on the formation of René Descartes's philosophical method is explored. A separate section is devoted to cast-iron fireback plates of the Richelieu era – artefacts reflecting the state of metallurgical production under wartime conditions, as well as the regional artistic and heraldic traditions of Burgundy, Dauphiné, and Champagne. The study combines methods of historical climatology, genealogy, art history, and regional history.

Key words: Thirty Years' War, René Descartes, Cardinal Richelieu, fireback plates, Franche-Comté, early modern period, France, 17th century.

Introduction. The Thirty Years' War was a series of successive military conflicts – the Bohemian War (1618–1620), the Palatinate War (1620–1623), the Dano–German Lower Saxon War (1625–1629), the Swedish War (1630–1635), and the final pan-European phase of 1635–1648, brought about by France's direct participation. All these conflicts were subsequently united by historiography under the common name of the Thirty Years' War, and in recent decades have received thorough analysis (Parker, 2013) (Münkler, 2023) (Gantet, 2024) (Bogdan, 2006) (Faure, 2019) et al. There also exists an unconventional and debated definition of this conflict as a "European civil war," proposed by the British historian Helmut G. Koenigsberger and supported by Parker in his fundamental work "Global Crisis: War, Climate Change and Catastrophe in the Seventeenth Century" (Parker, 2013, 211).

At the same time, it is difficult to fully agree with such an interpretation, for already in the first half of the 17th century regional and political identities in Europe were sufficiently formed, and the religious factor was gradually yielding to state and dynastic interests, particularly in the final phase of the war. It was in this very war that an awareness of political belonging – of being "French," "Swedish," "Czech," and so on – manifested itself clearly.

The Thirty Years' War may also be viewed as the first "geopolitical winter" of the modern age, reflecting the aggregate of prolonged cold periods, climatic anomalies, "years without summer," and a pan-European political crisis that lasted for decades. Climatic changes were not a direct cause of the war, yet they substantially deepened the suffering of the population and prolonged the consequences of the conflict.

Ultimately, the Peace of Westphalia of 1648 laid the foundations of international law and the European political order: the principle of state sovereignty, the balance of power, and respect for borders.

It is generally accepted that the human losses and mass displacement of population during the Thirty Years' War were proportionally greater than in the Second World War; the material and cultural destruction – almost equally vast in scale, and the catastrophic consequences – more prolonged in time (Parker, 2013, 211). In modern wars, as NATO General Christopher Cavoli noted in 2024,

"you either win quickly, or you face a long haul full of unpredictable turns" (Voice of America, 19 July 2024). These words could well have applied to the greatest and most far-reaching war of the 17th century, and would likely have been agreed upon by one of the most celebrated commanders of that war, Albrecht von Wallenstein. In 2025, Steven Bannon, the provocative political strategist of US President Donald Trump, described the protracted Russian–Ukrainian war as "an old-fashioned, grinding war in the bloody lands of Europe" (War Room, 14 July 2025). This characterisation may also be read as an allusion to the great wars of the past, in particular to the Thirty Years' War – the bloodiest conflict of early modern Europe.

Europe slowly healed its wounds after the Thirty Years' War. France, having emerged as one of the principal victors of the conflict, acquired Alsace and considerably strengthened its geopolitical position. Its traditional rival – the Holy Roman Empire of the German Nation – after 1648 increasingly lost its internal cohesion, concentrating real power mainly in the Austrian hereditary lands and retaining influence over the surrounding provinces rather in a formal-legal dimension. This one of the most ancient medieval empires of Europe, destined to survive for almost eight and a half centuries, was gradually transforming from a great elective empire into a complex supra-regional construction. The harshest consequences of the war fell upon the German lands, where over thirty years of military operations, epidemics, and famine, between 20 and 40 per cent of the population was lost, by various estimates, and in some regions even more. No one could be certain that war would not break out again shortly after the signing of the Treaties of Münster and Westphalia on 24 October 1648. Throughout 1649–1650 an extraordinarily complex demobilisation of armies numbering tens of thousands took place. A considerable part of the soldiers had no skills in peacetime labour and knew only the life of war. Born and shaped in conditions of conflict, they frequently resorted to violence, plunder, and participation in local skirmishes. It is for this reason that in the first post-war years, as researchers note, the threat of a renewed large armed conflict in Europe was considered entirely real, and the general stability of the continent rested on an extremely fragile balance.

France emerged as one of the principal victors of this great European war. From the period after 1648 onwards, as Cecily Wedgwood notes, "the fashion for France swept the whole world: England, Italy, the United Provinces (Holland) and even Sweden and Denmark" (Wedgwood, 2011, 513). This tendency is also traceable in the art of making cast-iron fireback plates: it is precisely in France that they reach the pinnacle of their artistic development, while other countries, England in particular, increasingly attempt to imitate French models. The German lands, which suffered the particularly severe consequences of the Thirty Years' War, for some time remained apart from these processes. In the second half of the 17th century, a gradual retreat from the strict asceticism and isolation characteristic of the preceding era took place there, and an inclusion in the broader current of European cultural interaction.

The aim of the study is a multi-dimensional analysis of the Thirty Years' War as a geopolitical, climatic, and cultural-material phenomenon.

The study employs a complex of interdisciplinary methods. For the analysis of geopolitical processes and diplomatic relations, the comparative-historical and problem-chronological methods were used. The climatic dimension of the conflict was examined with the involvement of data from historical climatology and dendrochronological reconstructions. The study of fireback plates as artefacts of material culture was carried out by means of art-historical analysis, heraldry, and attribution. To establish the social context of the use of everyday objects, the methods of genealogy and prosopography were employed. The source base of the study comprises published archival documents, memoir literature, narrative sources of the 17th century, and databases of cultural heritage objects of France.

The Climatic Factor. The Thirty Years' War coincided with the cold depression caused by the Maunder Minimum. One of the most thorough and methodologically balanced analyses of weather conditions during the Thirty Years' War, focused primarily on Central-Eastern Europe, was published in 2023 by a team of Czech–Swiss researchers (Brázdil, Dobrovolný, Pfister et al., 2023).

The coldest temperature extremes were observed in the 1620s, specifically in 1621 and 1628, as well as in 1635 (Brázdil, Dobrovolný, Pfister et al., 2023, 1868). At the same time, below-average temperatures persisted over longer periods, especially during the winter months of 1618–1624 and 1634–1642. During these periods Central Europe generally experienced considerably colder weather conditions compared to the reference period of 1961–1990. The coldest areas were predominantly located in the western half of Central Europe, while the most humid regions formed a belt along the German–Polish border and a cluster covering the southern part of Central Europe (Brázdil, Dobrovolný, Pfister et al., 2023, 1873). In addition, the great inflation associated with the war was among the highest in 1627 and 1628 under the influence of a general harvest failure linked to climatic conditions (Brázdil, Dobrovolný, Pfister et al., 2023, 8821).

With regard to solar activity, a tendency towards a decrease in annual total solar radiation was observed for the period 1618–1648; specifically, low values were recorded up to the early 1630s, after which a local solar maximum occurred around 1640, followed by a sharp decline (Brázdil, Dobrovolný, Pfister et al., 2023, 1870).

Warmth, Self-Isolation, and Methodical Doubt: René Descartes's Experience in the Age of the Thirty Years' War and Extreme Winters

Historians who studied European wars of the early modern period, notably the 17th and early 18th centuries, paid particular attention to winter quarters as a period of suspension of military campaigns, and also to winter as a favourable time for conducting diplomatic negotiations. These tendencies, as the historian François Royal noted, are especially clearly traceable from the end of the Thirty Years' War, and from the perspective of historical climatology – from the beginning of the Maunder Minimum. Analysing the influence of winter quarters on the course of individual campaigns, Royal cites the German negotiator of the Münster talks – Adam Adami, Prior of Murrhardt (Ger. Adam Adami, Prior von Murrhardt, 1610–1663), who wrote in his memoirs: "In winter we negotiate, in summer we fight" (Royal, 2017, 208). Yet winter was used not only as a time for negotiations. As an example, at the beginning of the War of the Palatinate Succession, French forces applied a "scorched earth" tactic against the castles, villages, and towns of the Electorate of the Palatinate (Mannheim and Heidelberg in particular) precisely during the winter period – in December 1688 and January–February 1689. Despite this, the influence of the climatic factor on the course of military campaigns from 1645 to 1715 still remains insufficiently accounted for in contemporary historiography.

It is considered that the period of two particularly cold winters – those of 1619–1620 and 1628–1629 – which the philosopher René Descartes spent during the quartering of imperial troops in self-imposed isolation in a warm room, may have influenced his formation of the principles of the method of radical doubt. The Central European temperature series identifies 1621, 1627, and 1628 (alongside 1618) as the three coldest summers of the early 17th century. These years are regarded as potential "years without summer" (Brázdil, Dobrovolný, Pfister et al., 2023, 1872).

Speaking of Descartes, it is worthwhile to examine separately the need for warmth as one of the conditions for concentrated intellectual work and its significance for the formation of the Cartesian critical mind. "I was then in Germany, to which country I had been attracted by the wars which are not yet ended there; and as I was returning from the coronation of the Emperor to join the army, the onset of winter detained me in quarters where, finding no conversation to divert me, and having, fortunately, no cares or passions to trouble me, I remained the whole day shut up alone in a room heated by an enclosed stove (Fr. poêle), where I had complete leisure to occupy myself with my own thoughts" (Descartes, 1966, 9).

These lines were written by René Descartes in his "Discourse on the Method" (Discours de la méthode, 1637), recalling the winter of 1619, when, following the coronation of Emperor Ferdinand II, he, as a mercenary officer in the army of Maximilian of Bavaria, was quartered in Germany (Haldane, 1905, 59). The philosopher describes those optimal conditions under which he applied his method-

ical doubt and critical mode of scientific inquiry, spending whole days in a warm room heated by a German stove in the winter of 1619. In other places of his life – in the Netherlands and in France – this role was performed rather by a fire in the hearth, which created an atmosphere of solitude and concentration.

During the cold years of the Maunder Minimum, residing, in particular, in the Netherlands in 1647 and subsequently in Paris, Descartes rewrote in French his treatise "Meditations on First Philosophy" (Fr. Méditations sur la philosophie première, 1641, 1647). In it he makes a second important mention of how, sitting in a dressing gown by the hearth and gazing into the fire, he applied his methodical doubt (Descartes, 2011, 13). The verbatim quotation from Descartes: "…for example, that I am here, seated by the fire, attired in a dressing gown…" (Descartes, 2011, 13). Descartes's biographers associate this mention with the extremely cold winter of 1628–1629 (Adam, 1910, 130).

"Shut up in a room with the stove" as early as the winter of 1619–1620, Descartes first mastered his scientific method. After the "winter by the stove" of 1619–1620, during which he experienced his "dreams," the philosopher began to develop the four principles of logic. His principles of philosophy and physics only took their final form in 1628–1629 (Adam, 1910, 34, 47, 55), that is, during the following extreme winter. Charles Adam called these two important periods of Descartes's formation "voluntary confinement in the stove" (Fr. réclusion volontaire dans un poêle) (Adam, 1910, 48–49). In both cases it concerns periods that Descartes described as seclusion in warmth – in a room with a stove or by a hearth. Charles Adam wrote that in the winter of 1628–1629 René Descartes "shut himself up in a room heated by a stove, as he had already done in 1619" (Adam, 1910, 130). Although in reality, in the conditions of 1628–1629, when Descartes was in the Netherlands, it was more likely a case of the hearth, since the philosopher himself writes that he is sitting by the fire, evidently meaning an open fire indoors. This underscores the important significance of warmth in the cold seasons of the year, above all in winter, for his scientific inquiry. In 1628 in the northern part of Germany, neighbouring the Netherlands, particularly cold conditions were observed (Brázdil, Dobrovolný, Pfister et al., 2023, 1875).

Descartes understandably feared the winter cold, though the northern coolness of the Netherlands was more acceptable to him than the Italian heat. "Tell me," he wrote in 1628 to Jean-Louis Guez de Balzac, "what curtains, what fans, what fountains can protect you as well in Rome from the discomforts of the heat as a stove and a bright fire here can protect you from the cold?" (Haldane, 1905, 115–116). Ultimately, the harsher climate of Sweden, to which he set out at the end of 1649 hoping to spend only a short time there, cut short the philosopher's life. Descartes said that in a cold climate "thoughts freeze in a person" (Makhun, ZN, 10.02.2006). Just before his death in February 1650, as his valet-de-chambre Schlüter testified, Descartes in Stockholm felt somewhat better and sat down by his beloved hearth with the help of his faithful servant (Haldane, 1905, 352). Thus the hearth became for the philosopher not only a space of concentration and intellectual work, but also the place of his final rest before death.

The Burgundian Fireback of the Richelieu Era in the Context of the Thirty Years' War

The Thirty Years' War dealt a blow to economic activity and the financial capacity to maintain armies in virtually every country of Europe involved in it (with the exception of the Dutch Republic (Brázdil, Dobrovolný, Pfister et al., 2023, 1876)). This also affected cast-iron production: a number of blast furnaces ceased operations due to military actions and a shortage of skilled workers. Consequently, the number of fireback/stove plates for heating, produced under the cold years of the Brueghel period and the subsequent Maunder solar minimum, from territories that were within or adjacent to the zone of military operations, is limited.

Few fireback plates dated to the period of the Thirty Years' War have come down to us. Let us draw attention to several plates from different regions of France, cast on the eve of France's entry into the Thirty Years' War.

Fig. 1. Fireback plate of 1634. Found in Avignon. Probably manufactured in the foundries of the Oche valley, former Duchy of Burgundy. Dimensions: 80 by 78 cm, thickness 3.5 cm, weight (actual) – 110 kg. Private collection. Source: photograph by the author

Among them, particular attention is drawn to a fireback plate of 1634, on which the royal coat of arms of France and Navarre is displayed in the style of cuir bouilli tooling. It is adorned with a pediment resembling a temple, resting on two turned baluster columns, typical primarily of the then Free County of Burgundy (Franche-Comté). The simplest explanation is therefore that this fireback plate of 1634 was manufactured precisely in Franche-Comté. The traditional motif of two columns could serve as a weighty argument in favour of such an assumption. But was the fireback plate, cast in 1634, truly of Comtois origin, all the more so on the eve of the French military campaign against the "Free County" of Franche-Comté, which was under the protection of the Holy Roman Empire? By this French military campaign is meant the Ten Years' War (Fr. Guerre de Dix Ans) – a term introduced by Girardot de Noseroy to denote the period of 1636–1646 as a separate episode of the Thirty Years' War.

Fig. 2. Fireback plate without a date, probably from the 1630s. The cliché with the coat of arms of France and Navarre "on leather" is identical to that observed on the plate of 1634; the coat of arms is placed in an architectural surround in the form of a temple with four columns and crowned with a cherub. Dimensions: 90 by 93 cm. Private collection. Source: curator.org. It may rather be a case of two plates having been manufactured in one and the same foundry workshop

Doubt is already raised by the very possibility of the coat of arms of France and Navarre appearing on a fireback plate from Franche-Comté, all the more so in 1634. On the one hand, this was a time of political neutrality that the elites of Franche-Comté had maintained in their relations with France for over a hundred years – since 1522 (Girardot de Noseroy, 1843, 10). At the same time, seeking to avoid military confrontation with France, certain representatives of the county were inclined to make gestures of goodwill towards the French crown, which was interpreted by opponents of such a policy in the region as a dangerous flirtation with one of the opposition political forces of France – Gaston of Orléans, the brother of King Louis XIII. Being in disgrace, the Duke of Orléans was compelled to leave France and sought permission for transit and asylum in Franche-Comté. It cannot be ruled out that certain lords – owners of blast furnaces – were interested precisely in such political manoeuvring, which the free imperial city of Besançon also occasionally displayed, harbouring a long-standing jealousy towards the county's capital – the city of Dole (Girardot de Noseroy, 1843, X, 23–28).

However, the French army of the Duke of Orléans, assembled on the territory of many villages of Franche-Comté in 1631 in opposition to King Louis XIII, sowed cruelty in the county and became a kind of prelude to the beginning of Louis XIII's Ten Years' War against Franche-Comté; its effective start may be dated as early as 1634, when the county gradually lost its neutrality. It is therefore hardly likely that after the cruelties perpetrated by the army of the Duke of Orléans in Franche-Comté, the local foundry workshops would have dared to cast fireback plates with the coat of arms of an unfriendly, and in fact hostile, kingdom.

The mere presence of columns on a fireback plate does not automatically assign it to Franche-Comté. This is a mistaken judgement often held by antique experts or owners of such objects. Columns, albeit infrequently, also appear on fireback plates manufactured in the foundries of the Duchies of Lorraine and Bar during the late rule of Duke Charles III (late 16th – early 17th century). Individual plates with columns, cast in the foundries of the Isère valley near Allevard, are also known. At the same time, certain artistic parallels in the decoration of fireback plates are traceable also in Ducal Burgundy, specifically in the metallurgical valley of the Oche river, where similarly styled plates with two columns supporting a temple pediment have likewise been recorded. We are therefore inclined to identify this plate as one that was cast in the province neighbouring Franche-Comté – Ducal Burgundy.

The fireback plate of 1634 refers us to a pivotal stage of the Thirty Years' War – the year when France was already openly preparing to enter the armed conflict against the Spanish Monarchy. This year was significant both for the history of France and for Europe as a whole. The year before, the troops of Louis XIII had invaded the Duchy of Lorraine and forced Duke Charles IV to abandon his domains; the fact that political asylum in the German lands was offered to him by the commander of the imperial army, Generalissimus Albrecht von Wallenstein (1583–1634) (Du Boys de Riocourt, 1861, 62), merely underscores the profound polarisation of the military-political forces of the time in Europe. Proceeding from the date "1634" inscribed on the fireback plate, it should be emphasised that it was in this very year that Wallenstein was killed, and the leading role in imperial command was assumed by Archduke Ferdinand, the future Emperor Ferdinand III. In that same year of 1634 the Swedish–Saxon coalition suffered a crushing defeat, which compelled the First Minister of France, Cardinal Richelieu, to take the final decision to enter the country into the war. In 1635 France – a Catholic state with pronounced hegemonic ambitions – officially entered the Thirty Years' War against the Habsburg dynasty, supporting the anti-Habsburg forces of Germany, Sweden, and the Netherlands. From that moment the war definitively lost its original religious character, transforming into a struggle between the leading European dynasties for hegemony.

The Fireback Plate of 1634 with the Coat of Arms of the Maniquet du Fayet Family. Isère Valley, Dauphiné

Yet another fireback plate of 1634 refers us to a different iron-ore region of France – the province of Dauphiné.

In the first decades of the 17th century (approximately up to 1630) blast furnaces were built along the Isère river valley in Dauphiné – at Touët, Lansy, Tancen, and in Adras; at this same time blast furnaces appeared at Vaulnaveys and Vizille. All of them operated on ore from the deposits of Allevard (Belhoste, 1992, 7).

In the 16th–17th centuries Allevard, as an ancient metallurgical centre, adopted smelting technologies from northern Italy, Styria, Carinthia, and above all from the metallurgical valley of the Upper Saône (Franche-Comté) with the participation of experienced masters and furnace operators from these regions (Bourgin, 1920, 170–171) (Belhoste, 1992, 7). As late as 1778, a representative of one of the leading foundry families of Franche-Comté, Jean-Renobert Monniot (Fr. Jean-Renobert Monniot), was invited by the President of the Parliament of Dauphiné to work for a year in Allevard for a high monthly salary (36 livres, as well as 400 livres for travel) (Lassus, 1987, 468). Thus, the foundry masters from Franche-Comté brought with them not only technical knowledge and skills in operating blast furnaces, but also production traditions and artistic approaches to the decoration of fireback plates, which were subsequently partially modified by the local masters of Allevard.

Below we shall examine the heraldic fireback plate, cast from pig iron in one of these blast furnaces, which represents yet another combination of Besançon columns within a temple.

Fig. 3. Fireback plate with the coat of arms of Charles Maniquet du Fayet or his son Prosper Maniquet du Fayet in high relief. Found in an old manor house. Source: photograph by the author

The coat of arms on the plate belongs to the captain, seigneur du Fayet, Charles de Maniquet du Fayet (Fr. Charles de Maniquet du Fayet, ? – before 1651) or his son Prosper de Maniquet du Fayet (Fr. Prosper de Maniquet, seigneur du Fayet, 1616 – c. 1684), captain of the Richelieu regiment (Fr. capitaine au régiment de Richelieu).

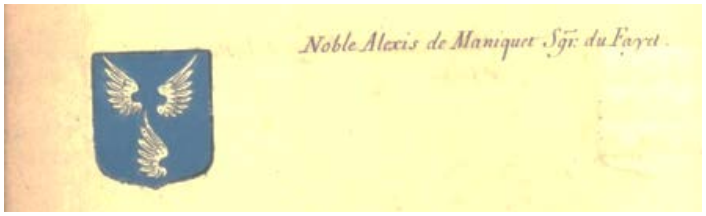

Fig. 4. Coat of arms of the house of Maniquet du Fayet. Source: Pompery, 1906

Fig. 5. Coat of arms of Hector-Alexis de Maniquet, seigneur du Fayet (? – 1705), captain of cavalry of the Bourbon regiment (Fr. Capitaine de cavalerie au régiment de Bourbon). Source: Hozier Ch. BnF. Ms. 32238, Dauphiné, XI, 200

Members of the Maniquet family probably came to Dauphiné from Italy in the second half of the 15th century (Gallier, 1866, 5) (Pompery, 1906, 5). The provincial lords Maniquet du Fayet from Dauphiné appear at the royal court of Charles IX in the 1560s. The father of Charles de Maniquet, Hector de Maniquet, seigneur du Fayet, was chief steward (Fr. maître d'hôtel) of the sister of King Charles IX – Margaret of Valois (1567–1585) (Courcelles, 1820, T.2, 9) (Pompery, 1906, 5). King Charles IX and his mother Catherine de Medici entrusted Hector de Maniquet with a number of secret diplomatic missions (Gallier, 1866) (Pompery, 1906, 13). In 1573, at the Château du Fayet, in great secrecy, Marie Touchet (Fr. Marie Touchet), mistress of Charles IX, gave birth to a son – Charles de Valois (1573–1650) (Gallier, 1866, 7). The illegitimate son of the king was subsequently legitimised and received the title of Duke of Angoulême. In addition to chief steward, Hector de Maniquet was honoured to hold the position of Grand Master of the Royal Waters and Forests of France (Fr. grand maître des Eaux et Forêts de France) (Pompery, 1906, 6, 14–15).

As Anatole de Gallier (Fr. Anatole de Gallier) wrote, the ancient fief of du Fayet was situated at the foot of a wooded hill, overlooking the greyish waters of the Isère river and the Graisivaudan valley (Fr. Graisivaudan), opposite the mountain range beyond which lies Allevard (Gallier, 1866, 4). This part of the Alps, crowning the French border with Savoy, contained significant deposits of iron ore (Bourgin, 1920, 169). It is known that in 1571 Charles IX granted Hector de Maniquet extensive holdings in the royal Servette (Fr. Servette) near du Fayet (Gallier, 1866, 6), which were probably also used to supply the blast furnace at Allevard, which repeatedly ceased operations precisely due to a shortage of charcoal (Bourgin, 1920, 169–171).

We have no doubt that the fireback plate with the Maniquet du Fayet coat of arms was manufactured in the foundry workshops of Allevard and may have been intended for installation in the hearth of one of the manor houses of the seigneurs Maniquet du Fayet.

On one of the photographic postcards (early 20th century) of the Château du Fayet, a fireplace is depicted, the overmantel of which is decorated with a coat of arms bearing three demi-wings, which readily identifies the owners – the Maniquet du Fayet family. In the fireplace in this photograph can be seen a fireback plate of 1609 with a relief inscription conveying the content and purpose of such objects for the noble milieu: "PELLISSIER MA FORGÉE POUR LUSAGE DES FEUX POUR MONSEIGNEUR ET MAISTRE ET LUY DONNER PLAISIR CEST POUR LUY QUON MA FAIT ET GUILME FAUT FINIR DES FEUX IAY PRINS MA FORME ET LA PERDRAY PAR EUX LE PREMIER IENVIER 1609" (Pellissier – this more likely refers to a person, possibly a master founder – author – cast me for use in the fires, for my lord and master and to give him pleasure; it is

for him that I was made. I have taken my form – and shall perish through them (through the fires). The first of January 1609) (POP, PA00117118).

Fig. 6. Photograph of the fireback plate of 1609 from the Château du Fayet; state at the beginning of the 20th century. Photographer unknown. Source: Ministère de la Culture. Château du Fayet (Barraux, Isère). Plaque de cheminée, 1609. Notice PA00117118. Base POP – Plateforme Ouverte du Patrimoine

Evidently the owners of the family Château du Fayet, in which these fireback plates may have been located, during meals and conversations by the fire discussed an event that by its ceremony stirred not only France but the whole of Europe. This refers to the ritual of declaration of war – a practice that had not been employed by European states for several centuries. In May 1635 heralds in medieval attire bearing the coats of arms of France and Navarre (precisely the coat of arms depicted on the plate) set out from Paris; one of them solemnly delivered the act of declaration of war to the King of Spain, Philip IV, in Madrid. This gesture marked the beginning of the final act of the German tragedy in the Thirty Years' War. France, preserving historical traditions, knew how to wage war combining political calculation with a refined symbolic gesture.

Cast-iron fireback plates from the province of Dauphiné belong to the few regional traditions in France where production was not substantially interrupted and continued during the period of the Thirty Years' War (1618–1648). Characteristic of these plates is a composition in which fleur-de-lis alternate with dolphins – the heraldic symbols of the province – along the left, right, and upper edges of the object; in the centre the year of casting was usually placed together with other iconographic elements.

Upper Marne, Champagne: Plates with the Coat of Arms of Richelieu

The firebacks from Dauphiné of 1634 may be considered "plates of the Richelieu era." Attention should also be directed to plates bearing directly the coat of arms of Cardinal Richelieu. A cast-iron fireback plate with the coat of arms of Cardinal Richelieu, preserved in the Museum of Fine and Decorative Arts in Châlons-en-Champagne (Fr. Châlons-en-Champagne). Dimensions: width 1.28 m, height 1.07 m, depth 5 cm. As the founder of the military fleet, Richelieu established customs barriers to protect domestic iron production (1632), thinking above all of arming vessels with cast-iron cannons and cannonballs.

The ingenious Cardinal Richelieu, as "the sinew of the state" (Wedgwood), with his talents and resources conducted many events, buying numerous important figures of foreign states, and subsi-

dised Protestant Sweden. And all of this for the wellbeing and might of the French monarchy. Through defeats and setbacks in the Thirty Years' War, Richelieu managed to bring into France's hands the small Duchy of Savoy in the Alps, to secure from Catalonia the election of Louis XIII as Duke of Barcelona, independent of the Spanish crown, weakened Spain and the Spanish Netherlands, created a highly efficient professional nationally homogeneous army, one of the strongest in Europe, and made an attempt to bring the French Kingdom's control over Alsace, Lorraine, and Franche-Comté. "This cruel war," wrote the noted Comtois figure Jean Girardot de Noseroy,

"was exclusively Richelieu's affair, planned and conducted thanks to the subtlety of his mind, the absolute power he held over the arms, treasuries, and councils of France" (Girardot de Noseroy, 1843, 19).

Fig. 7. Fireback plate with the coat of arms of Cardinal Richelieu, preserved in the Museum of Art and Archaeology in Châlons-en-Champagne. Period of manufacture – 1633–1642, probably in Upper Marne. Dimensions: width 1.28 m, height 1.07 m, depth 5 cm. Photograph by the author

Fig. 8. Fireback plate with the coat of arms of Cardinal Richelieu. Originates from the house of Eugène Alluaud, artist and ceramicist from Crozant in the Creuse département, historical region of Limousin (Fr. Crozant en Creuse). Period of manufacture – 1633–1642, probably in Upper Marne, province of Champagne.Dimensions: height 0.94 m, width 0.84 m, depth 4 cm. Source: private collection, Claude Augustin

France's participation in the Thirty Years' War substantially undermined the socio-economic situation in the country, effectively nullifying a considerable part of the results of Henry IV's reforming efforts. By the time the war ended in 1648, France had once again set upon the path of deep destabilisation. Plague, cold, and famine, as well as the internal political unrest of the Fronde period, placed the state on the edge of survival.

Conclusions. The Thirty Years' War emerges as a complex and multi-dimensional phenomenon that goes far beyond the bounds of a purely military conflict. Its geopolitical outcome was the Peace of Westphalia of 1648, which laid the foundations of the system of state sovereignty and international law and determined the contours of European politics for the following two centuries. France emerged as one of the principal beneficiaries of the conflict, while the German lands bore catastrophic human and material losses.

The climatic factor – the cold depression of the Maunder Minimum – played a significant role in deepening the humanitarian consequences of the war: harvest failures, inflation, and climatic anomalies of the 1620s and 1630s substantially complicated the situation of the population. At the same time, the extreme winters of that era also influenced intellectual culture: the conditions of isolation in warmth described by René Descartes became the environment for the formation of his method of radical doubt.

The analysis of cast-iron fireback plates – Burgundian, Dauphinois, and Champenois – allows them to be viewed as authentic testimonies of the age: artefacts reflecting the state of regional metallurgy, the heraldic and diplomatic signals of their era, and the indirect presence of the great war in the everyday life of the French provinces. The introduction of these objects into scholarly circulation broadens the source base for the study of the material culture of early modern France.

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DOI https://doi.org/10.30525/2592-8813-2026-2-37

CULTURAL HERITAGE RESTORATION AND INTEGRATION IN LIBERATED TERRITORIES AS AZERBAIJAN'S POST-CONFLICT SOFT POWER STRATEGY

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Abstract. The preservation, restoration and promotion of cultural heritage is a priority in the state policy of the Republic of Azerbaijan, and international cooperation in this area is highly valued. The strategic potential of national culture, provided that traditional national identity is preserved, plays a key role in Azerbaijan's integration into the global cultural community. This situation, coupled with the looting and destruction of approximately 20% of Azerbaijani territory under Armenian occupation for nearly 30 years, the destruction and usurpation of ancient historical and cultural monuments, underscores the importance of preserving, restoring, and promoting national cultural heritage and necessitates the establishment of international cooperation in this field. The return of territories liberated from 30 years of occupation has significantly contributed to international cultural cooperation, enhanced the international prestige of the Republic of Azerbaijan, and become one of the most important soft power tools for promoting national heritage and strengthening post-conflict peace.

Key words: cultural heritage, Republic of Azerbaijan, cultural integration, international cooperation, soft power, Karabakh, Eastern Zangezur.

Introduction. The rich cultural heritage of the Azerbaijani people confirms that the country is one of the oldest centers of civilization in the world. Traces of our history live on in every region of Azerbaijan. These monuments, our national and cultural heritage make us reflect on the lifestyle and thoughts of our ancestors. Moreover, many of these ancient monuments are of not only national but also global significance. By studying their history, it is possible to learn about the lifestyle and aspirations of early humans. It is considered a moral duty for every citizen to approach ancient monuments with respect and sensitivity. From this perspective, the cultural integration of the Azerbaijani territories that have been under Armenian occupation for almost 30 years is a complex process that encompasses the reintegration of these regions into the cultural, historical, and social fabric of Azerbaijan, the restoration of destroyed heritage, and the organization of a "Great Return" to the region within a cultural context. State policy, aimed at promoting, recognizing and protecting the culture and cultural values of the liberated territories in the international community, and at increasing opportunities for integration in the international cultural sphere, with political, economic and social repercussions, aims to enhance Azerbaijan's "soft power" and strengthen its international reputation.

The purpose of research is to analyze the transformation of cultural activities in the liberated territories (Karabakh and Eastern Zangezur) into one of the most important soft power tools for enhancing Azerbaijan's international prestige, promoting its national heritage, and strengthening post-conflict peace.

Analysis of the latest research and publications on the subject, the scientific compilation "Cultural Heritage Management" edited by Turkish professor M. Çakır stands out. The book devotes considerable space to the relationship between culture and tourism, and concepts such as "cultural tourism", emphasizing the preservation and importance of cultural heritage and its direct impact on the tourism sector. Globalization, changes in the cultural sphere, cultural diversity throughout history and its role in the development of nations and states, and reciprocal cultural relations are also among the topics covered. Australian researcher G. Aplin, in his book "Heritage, Identification, Preservation and Management", includes all global elements that need to be preserved and appreciated for future

generations under the category of "heritage". The author examines examples of movable and immovable heritage, encompassing everything from historical sites to buildings that constitute the integrity of cultural and national heritage. In light of the provisions of UNESCO conventions and other international agreements, the protection and management of cultural heritage, attitudes towards the historical heritage of national minorities, and other related issues are examined and compared. In his monograph, "International Legal Regulation of the Protection of Cultural Heritage and Issues in the Legislation of the Republic of Azerbaijan", S.A. Süleymanlı analyzes the factors determining such regulation and examines it in the context of Azerbaijani legislation (Süleymanlı, 2018, s. 58). An article published in the newspaper "Azerbaijan", titled "Armenia's criminal acts aimed at destroying and distorting cultural heritage in Azerbaijani territories constitute genocide against humanity in general", analyzes that Armenia's terrorist policy against humanity is not limited to the occupation of Azerbaijani territories, but also causes serious damage to Azerbaijan's nature, biodiversity, historical and cultural monuments: "As a result of Armenia's aggression against Azerbaijan after 1988, 20% of our territories were occupied, Armenians carried out a kind of 'genocide' against historical structures and, at best, Armenianized them (3)". An article published in the journal "Public Administration: Theory and Practice", titled "Restoration of Cultural Heritage in the Liberated Territories of Azerbaijan and International Cooperation in This Field", analyzes how the restoration of liberated territories over the past 30 years has significantly contributed to international cultural cooperation, enhanced the international prestige of the Republic of Azerbaijan, and become one of the most important soft power tools for strengthening post-conflict peace through the promotion of national heritage (Şərifova, 2024, s. 261–263).

Results and discussion. Following the Patriotic War, which began on September 27, 2020, in response to Armenian provocation and lasted 44 days, culminating in Azerbaijan's victory, and thanks to local counter-terrorism operations conducted on September 19 and 20, 2023, the so-called separatist organization retreated, and as a final step towards restoring our territorial integrity, President Ilham Aliyev raised the flag of the Republic of Azerbaijan in the regime's capital, Khankendi, on October 15. Our military successes have created favorable conditions for the recovery of our national and cultural heritage, which has been under occupation for thirty years, and for Azerbaijan to make significant contributions to international cultural cooperation in this area (17). However, Armenia, which has occupied Karabakh and the Eastern Zangezur territories, one of Azerbaijan's oldest settlements, for nearly thirty years and violated national and cultural heritage, plays a significant role in this matter. In the 1990s, disregarding international conventions, particularly the Hague Convention on the Protection of Cultural Property in Armed Conflict of May 14, 1954, and its protocols, as well as the UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage, they looted and destroyed 13 world-renowned historical and cultural monuments, 22 museums with over 40,000 exhibits, 927 libraries containing approximately 5 million books, 31 mosques, and 4 art galleries in the occupied territories of Karabakh and Eastern Zangezur, and did not hesitate to seize and appropriate the national and cultural heritage of our people (18).

Victory created an opportunity to examine our rich cultural heritage, which had long remained uncontrolled in the region, to record its initial state, and to document the work done. The first step in this direction was the inventory process initiated by the Ministry of Culture of the Republic of Azerbaijan on November 3, 2020. Thus, Azerbaijan is recognized as one of the few countries that have taken significant steps to protect historical and cultural monuments in the territories liberated from occupation during the war. As a result of the initial monitoring (inventory), a number of artifacts of historical, architectural, and archaeological significance were identified and their condition recorded in the liberated territories (20). During the observation, it was found that many of the monuments had been deliberately destroyed, burned, looted, and subjected to other acts of vandalism; at the same time, acts of vandalism and aggression were carried out in places of religious and spiritual

significance, such as cemeteries, mosques, and mausoleums; It has been determined that a number of historical and cultural monuments were deliberately and purposefully altered from their original architectural features and used for military purposes, with the aim of denying and distorting Azerbaijan's history, culture, and ethnic identity (Sherifova, 2021, p. 118). Remaining committed to its multicultural traditions and tolerance, Azerbaijan considers the reconstruction of its Christian heritage, largely destroyed by Armenians during the occupation, as necessary and fundamental in the liberated territories. The reconstruction and restoration of the Kazanchi Church in Shusha is a vivid example of this. Built between 1868 and 1887 by Armenian masters Avetis Yeramishyans and Simon Ter-Akopyan, the Kazanchi Church became the center of the Armenian Gregorian diocese in the Karabakh region during the occupation of Shusha between 1992 and 2020, under the orders of Armenian clergy. Rebuilt between 1981 and 1988 by order of the Ministry of Culture of the Azerbaijan SSR, the Kazanchi Church was registered as a historical monument. Like other historical and cultural monuments, the Kazanchi Church was restored to its original artistic and aesthetic appearance based on historical documents, archival materials, and appropriate methodology. Because Armenians are well aware of historical facts, they distorted the true history of the ancient Albanian Christian monuments in Karabakh. This group, lacking any understanding of ancient historical and cultural traditions in Karabakh and Zangezur, distorted the true history of Albanian Christian monuments by carving Armenian inscriptions and adding Armenian-Gregorian elements under the pretext of "restoration", thus altering their original architectural appearance. Thus, Armenian vandals attempted to seize the Church of St. John in the village of Tug in the Khojavend region through forgery and alterations. Another historical monument that Armenians tried to seize through forgery was the ancient Agoglan Alban monastery in the Lachin region. After the occupation of the Lachin region in 1992, Armenians made a number of changes to its architecture and interior in order to seize the monastery. According to Rafig Danakari, vice-chairman of the Albanian-Udi Christian Religious Community in Azerbaijan (successor to the Independent Apostolic Church of Albanian (Caucasus)), while altars in Albanian churches are three steps high, those in Armenian churches are five to six steps high. The Armenians resorted to forgery, raising the monastery's altar even further. They also altered the cross stones and painted Armenian crosses on the walls. However, as the structure itself indicates, this is an Albanian temple. Since 1999, Armenians have been conducting archaeological excavations in the illegally occupied territories of Azerbaijan, presenting the findings from the Azikh cave to the world as "examples of Armenian material culture". All these facts were corroborated in October 2010 by the international assessment mission led by the OSCE Minsk Group Co-Chairs, who provided evidence of changes in infrastructure, place names, and illegal economic activities in the occupied territories. There are many other similar examples (Ismayilov, 2015, pp. 19–20).

The reconstruction of historical and cultural monuments destroyed during 30 years of occupation forms the basis of the cultural integration of Azerbaijani territories. Due to the scarcity of companies specializing in the restoration and preservation of monuments in our country, contracting with foreign partners to carry out these works is crucial. This situation, along with strengthening cultural cooperation between the Republic of Azerbaijan and these countries, has ensured and will continue to ensure a rapid influx of foreign investment into our country. Restoration and preservation projects entrusted to foreign experts are discussed with local experts, and work begins under their supervision only after the project has been approved by the relevant authorities in accordance with the law (Sherifova, 2024, pp. 261–263). President Ilham Aliyev of the Republic of Azerbaijan expressed his views on this matter at the Commonwealth of Independent States Heads of State Council meeting as follows: "We are attracting friendly countries to Azerbaijan and we will continue to do so. The first contract was signed with a Turkish company, and the second is planned with an Italian company. On this occasion, I call upon the heads of state and countries with whom Azerbaijan maintains friendly relations to actively participate in these projects as contractors through their companies. We want companies from friendly

countries to participate in the reconstruction of our cities and towns. We want them to implement these projects and show their solidarity, because undoubtedly we will rebuild all the cities, revive Karabakh, and make it one of the most developed regions in the world". At the same time, at the 12th Summit of the Council of Heads of State of the Organization of Turkic States (OTS) held in Gabala on October 7, 2025, President Ilham Aliyev expressed his gratitude to the brotherly countries for their support in the reconstruction of Karabakh and Eastern Zangezur, noting that the Mirza Ulugbey School in Fuzuli, the Kurmangazi Children's Creativity Center, and the Manas School in Aghdam are already operational: "This is a gift from our Uzbek, Kazakh, and Kyrgyz brothers (19). The gift from our Hungarian brothers is the school built in Jabrayil, and the gift from our Turkmen brothers is the mosque whose foundation was laid today in Fuzuli. Brotherly Turkish companies are building countless tunnels, bridges, and roads. The Azerbaijani people will never forget this fraternal suppor".

The role of Azerbaijan's liberated territories in international cultural cooperation is fundamental, and this region serves as a platform for intercultural dialogue, a culture of peace, and the restoration of historical heritage. The main functions of the liberated territories on the international cultural platform are:

– The participation of international experts in the restoration of 68 religious monuments and other cultural and historical treasures destroyed during the occupation, and Azerbaijan's efforts to restore these monuments within the framework of cooperation with the UN and other international organizations, make a significant contribution to the restoration of historical and cultural heritage at the international level.

– By restoring Islamic and Christian (Albanian) heritage monuments destroyed by Armenians, Azerbaijan demonstrates its commitment to multicultural values to the world. Thus, the restoration and preservation measures carried out in the liberated territories, bringing these monuments back to their original artistic and aesthetic appearance, are an example of multiculturalism and tolerance.

– As we have noted, the liberated territories contain valuable historical and cultural monuments of national and international significance: the Khudaferin bridges, the Shusha fortress, the Azikh cave, the Ganjasar and Khudaven monasteries, and the Mausoleum of Qutullah Musa. Although some monuments such as the Uzeyir Bey Hacıbeyli statue, the Molla Panah Vagif bust and mausoleum, the Bulbul House Museum, the Saatli Mosque, the Ashaghi and Yuhari Govhar Agha, and the Aghdam Friday Mosques have been restored, vandalism against this rich cultural heritage poses a threat to the entire world heritage. Informing the international community about the destruction of these unique historical sites and condemning this aggressive policy means condemning vandalism at the international level.

– The reconstruction and opening of cultural centers, libraries, and theaters in the liberated territories, as well as the rebuilding of the region's cultural infrastructure, including cultural events and festivals held in Shusha, are among the factors accelerating the region's integration into Azerbaijan's cultural life. The Kharibulbul International Folk Festival, the Vagif Poetry Days, and the Uzeyir Hajibeyli International Music Festival, traditionally held in Shusha, bring together folk groups, musicians, poets, writers, and foreign musicians from different countries, showcasing the region's cultural diversity and creating a conducive environment for literary exchange.

Cultural events held in the liberated territories (Karabakh and Eastern Zangezur) have become one of the most important soft power tools for enhancing Azerbaijan's international prestige, promoting its national heritage, and consolidating post-conflict peace. These events convey not only cultural messages but also political and geopolitical messages, strengthening the republic's image on the international stage as a "constructive and peace-loving state". Therefore, especially in the post-Cold War era, the importance of soft power has increased, and states have begun to apply elements of hard power, soft power, and smart power in a hybrid manner (Nye, 1990, pp. 156–157). Cultural diplomacy, as a field of soft power, aims to develop dialogue and understanding among other peoples and states by placing attractive cultural elements at the center of policy. Therefore, cultural activities

such as the restoration of cultural heritage and historical facts, strengthening the image of the "founding state", conveying a message of intercultural dialogue and tolerance, the cultural expression of the "silk fist" strategy, and international participation that directly communicates Azerbaijani realities to the international community, all proclaim Azerbaijan's undeniable historical and cultural roots through soft power and enhance its soft power potential.

As can be seen, sensitivity and care towards Azerbaijan's rich historical and cultural heritage, including the preservation of the historical image of the city of Shusha, is an integral part of state policy. It is no coincidence that the city of Shusha was declared "Azerbaijan's Capital of Culture" by the President of the Republic of Azerbaijan in 2021, and that the "Shusha City Reserve State Administration" was established by Decree No. 1375 on June 22 of the same year (21). The full restoration of the territorial integrity and state sovereignty of the Republic of Azerbaijan necessitates the creation of a new national ideology and a new cultural policy based on the Azerbaijani ideology of the National Leader of the Azerbaijani people, Heydar Aliyev (Mammadov, 2022, p. 49). Therefore, the "Azerbaijan Culture – 2040" concept, adopted in early 2026, aims to make these processes long-term and systematic, defining culture as an active national resource and a tool of soft power (16) . Culture was recognized for the first time at the global level as a factor in sustainable development under Goal 11.4 of the 17 Sustainable Development Goals adopted by the UN General Assembly on September 25, 2015: "Strengthening efforts to protect and preserve the cultural and natural heritage of the world". Preserving the diversity of cultural expressions is one of the global functions of culture in the modern era. The participation of all sectors of society is necessary to expand comprehensive and balanced cultural exchange in the name of intercultural understanding and a culture of peace. Therefore, intercultural dialogue should be encouraged, and cultural activities, cultural products, and services should be recognized as carriers of authenticity, value, and meaning, while preserving their unique characteristics.

Conclusion. The above-mentioned points once again prove that cultural diplomacy is one of the main tools in the process of integrating the liberated territories of the Republic of Azerbaijan into the international community. Activities related to the promotion, recognition and preservation of the culture and cultural values of the liberated territories in the international community, including the improvement of the activities of cultural centers operating under the diplomatic missions of the Republic of Azerbaijan, the promotion of examples of Azerbaijani cultural heritage, their placement on authorized online platforms, their exhibition, research and other promotion, the improvement of the legal framework and regulatory procedures, the inclusion of the documentary heritage of the Republic of Azerbaijan in the UNESCO "World Memory Register" (22), the submission of books such as "Karabakh Khanate: Historical and Cultural Identity" to UNESCO with the support of the Heydar Aliyev Foundation, the exhibition of mugham and carpet weaving art at the international level and measures to increase the possibility of creating an international cultural tourism destination based on the rich tangible and intangible culture of Karabakh, are aimed at increasing Azerbaijan's "soft power" and strengthening its international reputation. This process creates a positive image of Azerbaijan through culture, diplomacy, tourism and economic relations. In conclusion, opening Karabakh to the international community strengthens Azerbaijan's role as a regional economic engine and intercultural bridge, and enhances its international prestige.

Yes, integration takes place in the cultural sphere, and this is one of the most important features of the modern globalized world. Cultural integration is the process of interaction, convergence, and sometimes fusion of the cultural values, traditions, customs, art, language, and lifestyles of different peoples, societies, or groups. Therefore, the analysis allows us to identify the most important perspectives of the contribution that the measures taken can make to the international cultural cooperation of the Republic of Azerbaijan as follows:

– The "soft power" of the state will increase;

– The promotion of Azerbaijani culture and cultural values at the international level will be strengthened;

– Negative propaganda against the international image, history, and culture of the Azerbaijani state will be weakened and minimized.

In conclusion, the international integration of Karabakh reshapes Azerbaijani culture not only locally but also regionally and globally. This creates a sustainable platform for the restoration, study, and integration of cultural heritage into world culture.

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DOI https://doi.org/10.30525/2592-8813-2026-2-38

BEYOND COMPLIANCE: EMBEDDING ETHICS-BY-DESIGN IN ARTIFICIAL INTELLIGENCE SYSTEMS UNDER THE EU AI ACT

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Abstract. This article explores the evolution of artificial intelligence governance in the European Union, focusing on the shift from regulatory compliance toward ethics-by-design. While the EU Artificial Intelligence Act establishes a comprehensive risk-based framework, the study argues that compliance alone is insufficient to address deeper ethical challenges related to human autonomy, dignity, fairness, and power asymmetries in algorithmic systems. The article conceptualizes ethics-by-design as a form of operational normativity that embeds ethical principles directly into the lifecycle of AI systems. It identifies key mechanisms for such integration, including ethical impact assessments, algorithmic auditing, transparency tools, and human oversight. At the same time, it highlights challenges such as translating abstract values into technical practices and avoiding superficial formalization. The study concludes that ethics-by-design is a necessary condition for the legitimacy of AI governance in the EU. By integrating ethical reasoning into system design, it becomes possible to bridge the gap between legal compliance and substantive justice, reinforcing a human-centric model of digital governance.

Key words: Artificial Intelligence Governance, Ethics-by-Design, EU AI Act, Trustworthy AI, Human-Centric AI, Algorithmic Accountability, Risk-Based Regulation, Digital Ethics, AI Regulation, European Union.

Introduction. The regulation of artificial intelligence has rapidly evolved from a predominantly technical and sector-specific concern into one of the central issues of contemporary legal, political, and ethical theory. This transformation is driven not only by the accelerated deployment of algorithmic systems across domains such as public administration, healthcare, finance, education, and security, but also by the increasingly profound influence these systems exert on the fundamental conditions of human existence. Artificial intelligence no longer functions merely as an auxiliary tool; rather, it actively shapes decision-making environments, redistributes power, and redefines the boundaries of human autonomy, dignity, privacy, and equality. In response to these developments, the European Union has positioned itself at the forefront of global AI governance by adopting a comprehensive regulatory framework, most notably the Artificial Intelligence Act, which seeks to establish a coherent model for the development and use of trustworthy and human-centric AI.

At the core of the European regulatory approach lies a tension that defines the contemporary debate on AI governance: the distinction between formal regulatory compliance and substantive ethical legitimacy. Modern legal systems, particularly in technologically dynamic contexts, tend to prioritize operational clarity by introducing categories, thresholds, and procedural requirements designed to ensure predictability and enforceability. The EU AI Act exemplifies this logic through its risk-based classification of AI systems and the corresponding obligations imposed on providers and deployers. While such an approach is indispensable for the functioning of a complex regulatory environment, it simultaneously reveals its own limitations. Compliance with legal requirements does not necessarily guarantee that an AI system is ethically acceptable in a broader normative sense. A system may be lawful, technically robust, and procedurally compliant, yet still undermine human autonomy, reinforce structural inequalities, obscure accountability, or erode meaningful human control over decision-making processes.

This gap between legality and ethical legitimacy has given rise to an increasing recognition that effective AI governance cannot be reduced to ex post regulatory oversight or formal adherence to predefined rules. Instead, there is a growing need to integrate ethical considerations directly into the design, development, and deployment of AI systems. It is within this context that the concept of ethics-by-design emerges as a critical paradigm. Rather than treating ethics as an external evaluative layer applied after a system has been developed, ethics-by-design calls for the proactive incorporation of normative principles into the very architecture of technological systems. This shift reflects a broader transformation in regulatory thinking: from reactive governance focused on mitigating risks, to anticipatory governance aimed at shaping technological trajectories in accordance with fundamental values (Floridi, 2018, p. 697).

The intellectual foundations of this paradigm are deeply embedded in the European tradition of human-centric AI. Early policy frameworks, including the Ethics Guidelines for Trustworthy AI developed by the European Commission's High-Level Expert Group, articulated a vision of AI that is not only lawful but also ethical and socially robust throughout its lifecycle. These guidelines identified key principles such as respect for human agency, transparency, fairness, accountability, and the protection of fundamental rights. However, despite their conceptual significance, such frameworks have often remained at the level of soft law, lacking direct enforceability and practical integration into technological processes. As a result, a persistent disjunction has emerged between the articulation of ethical principles and their actual implementation within AI systems.

The adoption of the EU AI Act represents a significant step toward bridging this gap by introducing binding legal obligations and a structured risk-based regulatory model. The Act distinguishes between prohibited practices, high-risk systems, limited-risk applications, and minimal-risk uses, thereby tailoring regulatory intensity to the potential impact of the technology. Nevertheless, the effectiveness of this model ultimately depends on how compliance is conceptualized. If compliance is treated as the ultimate objective, AI governance risks devolving into a procedural exercise that prioritizes formal adherence over substantive outcomes. In such a scenario, ethical considerations remain secondary, contingent upon voluntary initiatives rather than embedded requirements. Conversely, if compliance is understood as a minimum threshold rather than a sufficient condition, it becomes possible to reconceptualize AI regulation as a framework for institutionalizing ethical values within technological systems (Jobin, 2019, p. 375).

This reconceptualization is particularly important given the transformative nature of artificial intelligence. AI systems do not merely execute predefined tasks; they participate in structuring social reality by influencing how information is processed, how decisions are made, and how individuals are categorized and evaluated. In doing so, they introduce new forms of opacity, complexity, and distributed responsibility that challenge traditional legal doctrines. Harm or injustice may arise not from a single identifiable action, but from the cumulative effects of design choices, data selection, model optimization, and contextual deployment. Consequently, ethical considerations cannot be confined to retrospective assessments of outcomes; they must be integrated into every stage of the AI lifecycle, from initial design to continuous monitoring.

Against this backdrop, the central research question of this article can be formulated as follows: to what extent can the European Union's current regulatory framework, particularly the AI Act, move beyond a compliance-based approach and facilitate the genuine integration of ethics-by-design as a structural component of AI governance? This question is not merely technical; it reflects a broader normative choice between two competing visions of the digital future. One vision treats ethics as an optional supplement to regulation, valuable for enhancing trust and reputation but ultimately external to the core functioning of AI systems. The other envisions ethics as an intrinsic element of technological design, without which legal regulation remains insufficient and perpetually reactive.

The aim of this article is to argue in favor of the latter perspective. It seeks to demonstrate that sustainable and legitimate AI governance in the European context requires a shift from formal compliance to substantive ethical integration. In this framework, law is not abandoned but reinterpreted as a mechanism for institutionalizing ethical consensus rather than merely enforcing minimal standards. The article pursues three interrelated objectives: first, to reconstruct the theoretical foundations of ethics-by-design within the European normative tradition; second, to critically assess the limitations of the risk-based regulatory approach embodied in the AI Act; and third, to propose a conceptual model for embedding ethical principles into the lifecycle of AI systems through concrete governance mechanisms.

Methodologically, the study combines normative legal analysis with philosophical-ethical inquiry and institutional examination. The legal dimension focuses on the interpretation of the EU AI Act and related policy instruments. The ethical analysis explores the conceptual content of key principles such as human dignity, autonomy, fairness, and accountability, emphasizing their role as foundational rather than auxiliary elements of regulation. The institutional perspective, in turn, addresses the mechanisms through which these principles can be operationalized, including impact assessments, algorithmic audits, transparency tools, and human oversight structures. This interdisciplinary approach reflects the complexity of AI governance, which cannot be adequately addressed within the confines of a single discipline.

The novelty of the article lies in its reconceptualization of ethics-by-design as a structural condition for the legitimacy of AI governance rather than a voluntary or supplementary practice. By framing ethical integration as a necessary complement to legal regulation, the study contributes to ongoing debates on the future of European digital governance and the possibility of aligning technological innovation with the preservation of fundamental human values. Ultimately, the transition beyond compliance is presented not as a rejection of law, but as its deepening through the incorporation of ethical reasoning into the very fabric of technological development.

Discussion. The findings of this study demonstrate that the European approach to artificial intelligence governance is moving beyond traditional regulatory compliance toward a more integrated ethical model. Although the EU AI Act provides one of the most comprehensive legal frameworks for AI regulation, the analysis suggests that compliance alone is insufficient to address broader ethical concerns related to human autonomy, fairness, accountability, and the societal impact of algorithmic systems.

The study confirms arguments advanced in existing scholarship that principle-based AI ethics remains limited when ethical values are not effectively translated into technological and institutional practices. In this context, ethics-by-design emerges as a significant governance paradigm because it seeks to embed ethical reasoning directly into the lifecycle of AI systems rather than treating ethics as an external evaluative mechanism. The article demonstrates that tools such as ethical impact assessments, algorithmic auditing, transparency measures, and human oversight structures can play an important role in operationalizing ethical principles within AI development and deployment.

At the same time, the research highlights several important challenges. One of the key difficulties lies in translating abstract ethical concepts, such as fairness or autonomy, into concrete technical standards and measurable procedures. Excessive formalization may reduce ethics to procedural checklists, weakening its critical and reflective function. In addition, the effectiveness of ethics-by-design depends heavily on institutional culture, interdisciplinary cooperation, and the availability of organizational resources.

The analysis also underlines the broader normative significance of the European model of AI governance. The EU's emphasis on human-centric and trustworthy AI reflects an attempt to align technological innovation with democratic values and fundamental rights. In this regard, ethics-by-design strengthens the legitimacy of AI governance by bridging the gap between legal compliance and substantive ethical responsibility.

The practical significance of the study lies in its contribution to ongoing discussions on the future of AI governance. The proposed framework may support policymakers, regulatory institutions, and developers in designing AI systems that are not only legally compliant, but also socially responsible and ethically sustainable. Ultimately, the article argues that the long-term legitimacy of AI governance in the European Union will depend on the successful integration of ethical principles into the core architecture of artificial intelligence systems.

Theoretical Foundations of Ethics-by-Design: From Principles to Operational Norms

The concept of ethics-by-design has emerged as a response to a fundamental limitation in contemporary approaches to artificial intelligence governance: the persistent gap between the articulation of ethical principles and their effective implementation within technological systems. While the proliferation of ethical guidelines, frameworks, and declarations has significantly enriched the normative discourse surrounding artificial intelligence, these instruments have often remained insufficiently connected to the practical realities of system design and deployment. As a result, ethics has frequently been positioned as an external evaluative layer – invoked in policy rhetoric but only loosely integrated into the operational logic of AI systems. The ethics-by-design paradigm seeks to overcome this limitation by reconfiguring ethics as an intrinsic component of technological architecture rather than a post hoc regulatory consideration.

At its theoretical core, ethics-by-design is grounded in a rethinking of the relationship between normativity and technology. Traditional regulatory paradigms have tended to treat technology as a neutral object subject to external control through legal rules and institutional oversight. In this view, ethical evaluation occurs after the fact, assessing whether a given system complies with predefined standards or produces acceptable outcomes. However, such an approach becomes increasingly inadequate in the context of artificial intelligence, where systems are not merely tools but dynamic, adaptive, and often opaque infrastructures that shape the conditions under which decisions are made. The shift toward ethics-by-design reflects the recognition that normativity must be embedded within the design process itself, influencing not only what systems do, but how they are conceptualized, structured, and integrated into social environments (Floridi, 2019).

This shift can be understood as part of a broader transformation in normative theory, moving from principle-based ethics toward what may be described as operational normativity. Classical ethical frameworks – whether grounded in deontological commitments to duty and rights, consequentialist evaluations of outcomes, or virtue-based considerations of character – have historically provided abstract criteria for moral judgment. While these traditions remain indispensable as sources of normative orientation, their direct application to complex technological systems presents significant challenges. Artificial intelligence operates through layers of data processing, model training, optimization functions, and interface design, each of which introduces specific points of ethical relevance that cannot be adequately addressed through high-level principles alone. Ethics-by-design therefore requires the translation of abstract values into context-sensitive, technically actionable norms that can guide decision-making at each stage of the system lifecycle.

Within the European intellectual and regulatory tradition, this process of translation has been particularly visible in the development of the concept of trustworthy AI**.** The emphasis on trustworthiness reflects an attempt to bridge the gap between ethical aspiration and institutional practice by articulating a set of requirements that are both normatively grounded and practically applicable. Key principles such as respect for human dignity, autonomy, fairness, accountability, and transparency are not treated as isolated values, but as interconnected elements of a broader normative architecture. However, the significance of these principles lies not in their declarative formulation, but in their capacity to inform concrete design choices. For instance, the principle of autonomy implies not only the avoidance of coercive or manipulative systems, but also the active design of interfaces that support meaningful human agency and informed decision-making. Similarly, the principle of fairness

extends beyond the prohibition of discrimination to encompass the careful curation of training data, the selection of appropriate evaluation metrics, and the continuous monitoring of system outputs for unintended biases.

The transition from principles to operational norms also requires a redefinition of responsibility in the context of AI systems. In traditional legal frameworks, responsibility is often associated with identifiable actors and discrete actions. By contrast, artificial intelligence systems distribute agency across a network of designers, developers, data providers, deployers, and users, as well as across the technical components of the system itself. This distributed nature of agency complicates the attribution of responsibility and raises questions about how ethical obligations can be effectively enforced. Ethics-by-design addresses this challenge by embedding responsibility into the structure of the system, ensuring that accountability is not merely a matter of ex post attribution but is reflected in the design of processes, documentation practices, and oversight mechanisms. In this sense, responsibility becomes a property of the system's architecture rather than solely a characteristic of individual actors (Watcher, 2018, p. 862).

Another crucial dimension of ethics-by-design is its temporal orientation. Conventional regulatory approaches often operate retrospectively, responding to harms after they have occurred. In contrast, ethics-by-design is inherently anticipatory**,** seeking to identify and mitigate ethical risks before they materialize. This anticipatory logic aligns with broader developments in governance theory, particularly in the context of emerging technologies, where uncertainty and complexity necessitate proactive forms of regulation. By integrating ethical considerations into early stages of system development – such as problem definition, data selection, and model design – ethics-by-design aims to prevent the entrenchment of harmful patterns that may be difficult or impossible to correct at later stages.

At the same time, the operationalization of ethical principles introduces its own set of challenges. One of the central difficulties lies in the potential tension between competing values. For example, efforts to enhance transparency may conflict with the protection of intellectual property or privacy, while the pursuit of fairness may require trade-offs between different definitions of equality. Ethics-by-design does not eliminate these tensions, but it provides a structured framework for addressing them through explicit design choices and documented reasoning processes. In this regard, ethical decision-making becomes an integral part of system engineering, requiring interdisciplinary collaboration between legal experts, ethicists, engineers, and domain specialists.

Furthermore, the move toward operational normativity raises important questions about standardization and measurement. In order for ethical principles to be effectively embedded in AI systems, they must be translated into criteria that can be assessed, monitored, and, where necessary, enforced. This has led to the development of tools such as ethical impact assessments, algorithmic auditing frameworks, and standardized documentation practices. While these instruments represent significant progress, they also risk reducing complex ethical considerations to checklists or formal procedures. A key theoretical challenge, therefore, is to ensure that the process of operationalization does not strip ethical principles of their normative depth, but rather preserves their capacity to guide meaningful reflection and critical evaluation.

In this context, ethics-by-design can be understood as a form of normative mediation between abstract values and concrete technological practices. It does not seek to replace traditional ethical theory, but to extend it into new domains by developing mechanisms through which ethical reasoning can inform technical decision-making. This mediation is particularly important in the European context, where the legitimacy of AI governance is closely tied to the protection of fundamental rights and the maintenance of democratic values. By embedding ethics into the design of AI systems, it becomes possible to align technological innovation with the broader normative commitments of the European legal order.

Ultimately, the theoretical significance of ethics-by-design lies in its capacity to reconceptualize the role of ethics in technological governance. Rather than functioning as an external constraint or a secondary consideration, ethics becomes a constitutive element of system design, shaping both the objectives and the methods of AI development. This reconceptualization challenges the traditional separation between technical and normative domains, suggesting that the design of AI systems is inherently a moral and political activity. In doing so, it lays the groundwork for a more integrated approach to AI governance, in which ethical principles are not merely proclaimed, but systematically embedded in the structures that govern technological behavior (Veale, 2021, p. 104).

This theoretical framework provides the foundation for the subsequent analysis of the EU AI Act. While the Act represents a significant advancement in the legal regulation of artificial intelligence, its effectiveness ultimately depends on its capacity to incorporate and operationalize the principles outlined above. The following section therefore turns to a critical examination of the risk-based regulatory model, with particular attention to its strengths, limitations, and potential for enabling – or constraining – the transition toward ethics-by-design.

The EU AI Act and the Limits of Risk-Based Regulation

The adoption of the European Union's Artificial Intelligence Act represents a landmark moment in the global governance of emerging technologies. As the first comprehensive and binding legal framework specifically dedicated to artificial intelligence, the Act reflects the EU's longstanding ambition to position itself as a normative leader in shaping a human-centric and rights-based digital order. At the heart of this regulatory architecture lies the risk-based approach, which classifies AI systems according to the level of potential harm they may pose to individuals and society, and calibrates legal obligations accordingly. This model is widely regarded as both innovative and pragmatic, offering a structured method for balancing technological innovation with the protection of fundamental rights. However, despite its strengths, the risk-based paradigm also reveals significant conceptual and practical limitations when assessed from the perspective of ethics-by-design.

The core logic of the EU AI Act is built upon a hierarchical categorization of AI systems: prohibited practices, high-risk systems, limited-risk applications, and minimal-risk uses. This stratification enables regulators to focus their attention on those systems that are deemed most likely to produce serious harm, particularly in areas such as biometric identification, critical infrastructure, employment, law enforcement, and access to essential services. High-risk systems are subject to extensive requirements, including conformity assessments, risk management procedures, data governance standards, technical documentation, transparency obligations, and human oversight mechanisms. In contrast, systems categorized as presenting minimal or limited risk are subject to lighter regulatory burdens, thereby preserving space for innovation and experimentation.

From a legal and administrative perspective, this approach offers several advantages. It introduces clarity and predictability into the regulatory environment, facilitates enforcement by defining clear categories and obligations, and avoids the pitfalls of overly rigid or one-size-fits-all regulation. Moreover, by explicitly prohibiting certain uses of AI – such as manipulative or exploitative practices that undermine human autonomy – the Act demonstrates a commitment to safeguarding core European values. In this sense, the risk-based model represents a sophisticated attempt to operationalize the principle of proportionality within the domain of AI governance (Stix, 2021, p. 27).

Nevertheless, when examined through the lens of ethical integration, the limitations of this model become increasingly apparent. One of the most fundamental challenges lies in the reduction of ethical complexity to quantifiable risk categories**.** While risk assessment is an essential tool for regulatory decision-making, it inherently prioritizes measurable and foreseeable harms, often at the expense of more diffuse, long-term, or systemic ethical concerns. Issues such as the gradual erosion of human agency, the normalization of algorithmic decision-making, or the subtle reinforcement of social hierarchies may not be easily captured within predefined risk thresholds, yet they have profound implications for the normative structure of society.

Furthermore, the risk-based approach tends to reinforce a compliance-oriented mindset**,** in which the primary objective of developers and deployers is to satisfy regulatory requirements rather than to engage in deeper ethical reflection. In such a framework, ethical considerations risk being instrumentalized as components of risk management rather than recognized as independent normative commitments. The danger here is not that ethical principles are ignored, but that they are translated into procedural checklists that can be formally satisfied without necessarily transforming the underlying logic of system design. As a result, compliance may become a substitute for ethical responsibility, rather than its institutional expression.

Another critical limitation concerns the temporal structure of risk regulation**.** The AI Act, like many regulatory instruments, is primarily oriented toward the identification and mitigation of risks at specific stages of the system lifecycle, particularly prior to market deployment. While this ex ante approach represents a significant improvement over purely reactive models, it remains insufficient in the context of AI systems that evolve over time through continuous learning, data updates, and interaction with dynamic environments. Ethical challenges may emerge not only at the moment of deployment, but also during prolonged use, adaptation, and integration into complex socio-technical systems. A regulatory model that focuses predominantly on initial risk classification may struggle to account for these evolving dimensions.

In addition, the categorization of AI systems into discrete risk levels can obscure the context-dependent nature of ethical evaluation**.** The same technological system may produce vastly different effects depending on how, where, and by whom it is deployed. For example, an algorithm used for resource allocation in a private commercial setting may raise different ethical concerns than a similar system used in public administration or law enforcement. The risk-based model, however, relies on generalized categories that may not fully capture these contextual variations. This creates a tension between the need for regulatory standardization and the inherently situated character of ethical judgment.

The limitations of the risk-based approach also become evident when considering the issue of distributed responsibility**.** The AI Act assigns obligations to specific actors – primarily providers and deployers – thereby maintaining the traditional legal logic of identifiable duty-bearers. However, as noted in the previous section, AI systems are the product of complex networks involving multiple stakeholders, including data suppliers, model developers, system integrators, and end-users. Ethical risks often arise from interactions within this network rather than from the actions of a single actor. By focusing on formal roles within the regulatory framework, the Act may not fully address the diffuse and relational nature of responsibility in AI ecosystems (Morley, 2020, p. 2147).

Moreover, the emphasis on risk mitigation can inadvertently lead to a defensive model of governance, in which the primary goal is to avoid harm rather than to actively promote positive ethical outcomes. While the prevention of harm is undoubtedly essential, it does not exhaust the normative potential of AI governance. A truly human-centric approach would require not only minimizing risks, but also designing systems that enhance human capabilities, support social inclusion, and contribute to the public good. The current structure of the AI Act, however, is more explicitly oriented toward constraint than toward normative innovation, leaving the positive dimension of ethical design underdeveloped.

It is important to note that these limitations do not undermine the significance of the AI Act as a regulatory achievement. On the contrary, the Act provides a necessary legal foundation for the governance of artificial intelligence and establishes a baseline of protection that is indispensable in a rapidly evolving technological landscape. The critique advanced here is not directed at the existence of risk-based regulation as such, but at its insufficiency as a comprehensive model for addressing the ethical dimensions of AI. In other words, the problem is not that the AI Act does too much, but that it cannot, by itself, do enough.

This recognition points toward the need for a complementary framework that extends beyond risk classification and compliance. Ethics-by-design offers such a framework by shifting the focus from external regulation to internal system architecture. Rather than asking only whether a system meets regulatory requirements, ethics-by-design asks how ethical values are embedded within the processes of design, development, and deployment. It emphasizes continuous reflection, interdisciplinary collaboration, and the integration of normative considerations at every stage of the AI lifecycle.

In this light, the relationship between the AI Act and ethics-by-design should not be understood as oppositional, but as structurally interdependent. The Act establishes the legal conditions under which AI systems must operate, while ethics-by-design provides the normative orientation necessary to guide the interpretation and implementation of these conditions. Without the legal framework, ethical principles risk remaining abstract and unenforceable; without ethical integration, legal compliance risks becoming formalistic and insufficient.

The analysis presented in this section thus leads to a central conclusion: the risk-based regulatory model, while indispensable, represents only a partial response to the challenges of AI governance. Its effectiveness ultimately depends on its capacity to be complemented by a deeper integration of ethical principles into the design and operation of AI systems. The next section therefore turns to the practical dimension of this integration, examining the mechanisms, challenges, and governance models through which ethics-by-design can be realized in practice.

Embedding Ethics into AI Systems: Mechanisms, Challenges, and Governance Models

If the previous sections have demonstrated the conceptual necessity of moving beyond a purely compliance-based approach and the structural limitations of risk-based regulation, the question that follows is inherently practical: how can ethical principles be effectively embedded into the lifecycle of artificial intelligence systems? The paradigm of ethics-by-design only acquires normative significance if it can be translated into concrete mechanisms capable of influencing technological development in a systematic and verifiable manner. This requires not only the articulation of ethical goals, but also the creation of institutional, technical, and procedural instruments through which these goals can be operationalized.

At the most fundamental level, embedding ethics into AI systems involves a shift from external evaluation to internal integration**.** Rather than treating ethical assessment as a separate stage following system development, ethics-by-design integrates normative considerations into each phase of the AI lifecycle: problem definition, data collection, model development, testing, deployment, and continuous monitoring. This lifecycle-oriented perspective reflects the dynamic nature of AI systems, which evolve over time and interact with complex social environments. Consequently, ethical governance must also be continuous, adaptive, and reflexive (Mittelstadt, 2016, p. 3).

One of the central mechanisms for operationalizing ethics-by-design is the ethical impact assessment (EIA)**.** Building upon existing practices such as data protection impact assessments under the GDPR, EIAs aim to identify potential ethical risks at an early stage of system development. Unlike traditional risk assessments, which focus primarily on measurable harms, ethical impact assessments are broader in scope, encompassing questions of fairness, autonomy, dignity, and societal impact. They require developers and organizations to engage in anticipatory reflection, considering not only how a system functions, but also how it may reshape social relations and institutional practices. Importantly, the effectiveness of EIAs depends on their integration into decision-making processes, rather than their treatment as formal documentation exercises.

Closely related to impact assessments is the practice of algorithmic auditing**,** which provides a mechanism for evaluating the behavior of AI systems both before and after deployment. Auditing can take multiple forms, including internal audits conducted by developers, external audits performed by independent bodies, and continuous monitoring systems that track performance over time. From an ethical perspective, algorithmic auditing serves as a tool for ensuring accountability and transparency,

enabling stakeholders to detect biases, assess compliance with ethical standards, and identify unintended consequences. However, auditing also raises questions about standardization, access to proprietary systems, and the independence of evaluators, highlighting the need for robust governance frameworks that balance transparency with legitimate concerns such as intellectual property and security.

Another key dimension of ethics-by-design is the incorporation of explainability and transparency mechanisms**.** In the context of AI, transparency is not merely a matter of disclosing information, but of ensuring that system behavior can be meaningfully understood by relevant stakeholders. This includes not only technical explanations of model functioning, but also contextual information about data sources, decision criteria, and potential limitations. Explainability is particularly important in high-stakes domains, where individuals are affected by automated decisions and require the ability to challenge or contest outcomes. At the same time, the pursuit of explainability must be carefully balanced against the complexity of modern AI systems, which may resist simple forms of interpretation. Ethics-by-design thus calls for a nuanced approach to transparency, one that is sensitive to the needs of different audiences and the specificities of different use cases (Mittelstadt, 2019, p. 505).

The principle of human oversight, often operationalized through the notion of "human-in-the-loop" or "human-on-the-loop" systems, represents another cornerstone of ethical integration. While automation can enhance efficiency and consistency, it also risks diminishing human control and responsibility. Embedding ethics into AI therefore requires the design of governance structures that preserve meaningful human involvement in decision-making processes. This does not imply a rejection of automation, but rather a reconfiguration of the relationship between human and machine, in which human judgment remains the ultimate point of normative reference. Effective oversight mechanisms must ensure that human actors are not reduced to passive supervisors, but are empowered to understand, intervene in, and ultimately override algorithmic decisions when necessary.

Beyond these technical and procedural mechanisms, ethics-by-design also necessitates the development of institutional governance models capable of supporting ethical integration at an organizational level. This includes the establishment of interdisciplinary ethics committees, the integration of ethical expertise into development teams, and the creation of internal accountability structures that align organizational incentives with ethical objectives. Importantly, ethical governance cannot be confined to isolated units within an organization; it must be embedded within the broader organizational culture, influencing decision-making at all levels. This cultural dimension is often overlooked, yet it plays a critical role in determining whether ethical principles are genuinely internalized or merely formally acknowledged.

At the systemic level, the implementation of ethics-by-design raises the question of how different governance actors – public authorities, private companies, civil society organizations, and technical communities – can coordinate their efforts. AI systems are rarely developed or deployed within a single institutional context; they are part of complex ecosystems that span multiple sectors and jurisdictions. Effective ethical governance therefore requires mechanisms for multi-level and multi-stakeholder coordination, including regulatory guidance, standard-setting initiatives, certification schemes, and platforms for knowledge exchange. In the European context, such coordination is particularly important given the diversity of national legal systems and institutional arrangements within the Union.

Despite the availability of these mechanisms, the operationalization of ethics-by-design faces a number of significant challenges. One of the most persistent is the translation problem**,** namely the difficulty of converting abstract ethical principles into concrete technical specifications. While concepts such as fairness or accountability are widely endorsed, their precise meaning often remains contested, and different interpretations may lead to different design choices. This plurality is not necessarily a weakness, but it complicates the development of standardized approaches and raises questions about how ethical trade-offs should be resolved in practice (Mittelstadt, 2019, p. 507).

Another major challenge is the risk of formalization without substance. As ethical requirements become institutionalized, there is a danger that they will be reduced to procedural compliance, losing their critical and reflective dimension. Checklists, templates, and standardized metrics can facilitate implementation, but they may also encourage a superficial approach in which ethical considerations are treated as boxes to be ticked rather than as ongoing processes of evaluation and deliberation. Avoiding this outcome requires a balance between formalization and reflexivity, ensuring that ethical governance remains both structured and responsive.

The issue of power asymmetry also plays a crucial role in the effectiveness of ethics-by-design. Large technology companies possess significant resources, technical expertise, and influence over the development of AI systems, which may enable them to shape ethical standards in ways that align with their own interests. At the same time, smaller organizations and public institutions may lack the capacity to implement complex ethical governance mechanisms. Addressing these asymmetries requires regulatory support, capacity-building initiatives, and the development of shared standards that lower barriers to ethical integration.

Finally, the global nature of AI development introduces an additional layer of complexity. While the European Union promotes a human-centric approach grounded in fundamental rights, AI systems are often developed and deployed across multiple jurisdictions with differing normative frameworks. This raises questions about the translatability and scalability of ethics-by-design, as well as the potential for regulatory fragmentation. In this context, the European model may serve as a normative reference point, but its effectiveness will depend on its ability to engage with broader international dynamics.

Taken together, these mechanisms and challenges suggest that ethics-by-design should be understood not as a single tool or method, but as a comprehensive governance paradigm that integrates ethical reasoning into the structures, processes, and cultures of AI development. Its success depends on the alignment of technical design, institutional arrangements, and regulatory frameworks, as well as on the willingness of stakeholders to engage in continuous reflection and adaptation (Veale, 2021, p. 109).

In this perspective, the embedding of ethics into AI systems is not merely a technical task, but a fundamentally normative project that seeks to redefine the relationship between technology and society. By transforming ethical principles into operational norms, ethics-by-design offers a pathway toward a more responsible and human-centered form of innovation – one that does not merely comply with legal requirements, but actively contributes to the realization of shared values. The final section of this article will synthesize these insights and outline the broader implications for the future of AI governance in the European Union.

Conclusion. The analysis developed in this article has demonstrated that the contemporary European approach to artificial intelligence governance, while normatively ambitious and institutionally advanced, remains at a critical transitional stage. The adoption of the EU AI Act marks a significant achievement in establishing a structured and enforceable regulatory framework grounded in the protection of fundamental rights and the promotion of trustworthy AI. Yet, as the preceding sections have argued, the effectiveness of this framework ultimately depends on its ability to move beyond a narrowly defined compliance-oriented logic and toward a deeper integration of ethical principles into the very architecture of technological systems.

At the center of this transformation lies a fundamental conceptual shift: from viewing law as an external mechanism of constraint to understanding it as part of a broader normative ecosystem in which ethics plays a constitutive role. The risk-based regulatory model, despite its practical advantages, is inherently limited in its capacity to address the full spectrum of ethical challenges posed by artificial intelligence. By prioritizing measurable and foreseeable harms, it risks overlooking more diffuse and systemic effects, including the gradual erosion of human autonomy, the reconfiguration of social relations through algorithmic mediation, and the normalization of opaque decision-making

processes. These phenomena cannot be adequately captured through risk categorization alone, as they are embedded in the design choices and operational logics that shape AI systems from their inception (Veale, 2021, p. 111).

It is precisely in this context that the paradigm of ethics-by-design emerges as a necessary complement to existing regulatory approaches. As argued throughout this article, ethics-by-design should not be understood as a voluntary or supplementary practice, but as a structural condition for the legitimacy of AI governance. By embedding ethical principles – such as human dignity, autonomy, fairness, accountability, and transparency – into the lifecycle of AI systems, it becomes possible to bridge the gap between formal legality and substantive justice. In doing so, ethics-by-design redefines the role of ethics from an external evaluative framework to an internal design logic that actively shapes technological development.

The contribution of this study lies in its attempt to reconceptualize ethics-by-design as a form of operational normativity, capable of translating abstract ethical values into concrete mechanisms of governance. Through the analysis of ethical impact assessments, algorithmic auditing, transparency tools, and human oversight structures, the article has shown that ethical integration is not merely a theoretical aspiration, but a practical possibility – albeit one that requires careful institutional design and continuous reflexive engagement. At the same time, the identified challenges – ranging from the translation of ethical principles into technical specifications, to the risk of formalization without substance, and the persistence of power asymmetries – underscore the complexity of this endeavor and the need for sustained interdisciplinary collaboration.

From a broader perspective, the transition beyond compliance reflects a deeper normative ambition within the European project: the aspiration to align technological innovation with the preservation of human-centered values. This ambition is particularly significant in a global context characterized by competing models of digital governance, where the balance between efficiency, control, and individual rights is negotiated in different ways. The European Union's emphasis on human-centric AI represents not only a regulatory strategy, but also a normative statement about the kind of digital society it seeks to construct – one in which technology serves as an instrument of human flourishing rather than a mechanism of domination or exclusion (Morley, 2020, p. 2163).

However, realizing this vision requires more than the articulation of principles or the adoption of legal instruments. It demands a transformation in how artificial intelligence is conceptualized, developed, and governed. In particular, it calls for a reconfiguration of responsibility, in which ethical considerations are distributed across the entire network of actors involved in the AI lifecycle, and where accountability is embedded within the design of systems rather than imposed solely through external enforcement. It also requires a cultural shift within organizations and institutions, fostering an environment in which ethical reflection is not perceived as an obstacle to innovation, but as a prerequisite for its sustainability and legitimacy.

In this light, the relationship between the EU AI Act and ethics-by-design should be understood as mutually reinforcing rather than hierarchical. The Act provides the legal foundation necessary to establish minimum standards and ensure accountability, while ethics-by-design offers the normative orientation required to guide the interpretation and implementation of these standards in practice. Together, they form the basis of a more integrated model of AI governance – one that combines legal certainty with ethical depth, and procedural rigor with substantive legitimacy.

The findings of this article also suggest several broader implications for future research and policy development. First, there is a need to further refine the methodologies and tools through which ethical principles can be operationalized, ensuring that they remain both practically applicable and normatively meaningful. Second, greater attention should be devoted to the institutional conditions that enable or constrain ethical integration, including issues of capacity, expertise, and organizational culture. Third, the global dimension of AI governance must be taken into account, as the effectiveness

of the European model will depend on its ability to interact with and influence international regulatory and ethical frameworks.

Ultimately, the shift toward a human-centric paradigm of AI governance is not merely a technical or regulatory adjustment, but a profound normative project that redefines the relationship between technology, law, and society. The move beyond compliance signifies a recognition that legal regulation, while necessary, is not sufficient to ensure the ethical legitimacy of artificial intelligence. Only by embedding ethical reasoning into the core of technological design can it be ensured that AI systems remain aligned with the values that underpin democratic societies.

In this sense, the future of AI governance in Europe will not be determined solely by the precision of its legal rules, but by its capacity to preserve and institutionalize the primacy of human agency in an increasingly automated world. Ethics-by-design, as conceptualized in this article, offers a pathway toward achieving this goal, transforming artificial intelligence from a source of normative uncertainty into a domain of responsible and value-oriented innovation.

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DOI https://doi.org/10.30525/2592-8813-2026-2-39

DIGITAL EDUCATION, LINGUISTIC INTEGRATION, AND SOFT POWER IN THE TURKIC WORLD

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Abstract. This article examines the institutional architecture of digital diplomacy and strategic communication within the Organisation of Turkic States (OTS), analyzing how this Eurasian regional organization has evolved from cultural cooperation toward sophisticated information warfare capabilities and cyber governance frameworks. Drawing on primary policy documents, summit declarations, and operational initiatives from 2015–2025, we demonstrate that the OTS has constructed a multi-layered digital diplomacy architecture encompassing strategic communication, counter-disinformation mechanisms, media platform coordination, and nascent artificial intelligence governance. The analysis contributes to theoretical debates on digital diplomacy in non-Western regional organizations, demonstrating how authoritarian regimes instrumentalize digital technologies for strategic communication while resisting liberal normative frameworks. The article further examines the cultural dimensions of OTS digital diplomacy, including the Turkic World Vision 2040's mandate for digital heritage preservation, joint online encyclopedia development, and the harmonization of educational content across member states. We conclude that the OTS represents a distinctive model of civilizational digital diplomacy – one that prioritizes collective identity construction, technological self-sufficiency, and regime security over global interoperability and democratic participation.

Key words: Digital diplomacy, Organisation of Turkic States, Strategic communication, Regional organizations, Culture.

Introduction. The digital transformation of diplomacy has fundamentally reshaped the mechanisms through which states project influence, manage international reputations, and contest narratives within the global arena. Existing scholarship on digital diplomacy has largely concentrated on Western liberal democracies and major powers, leaving the strategies adopted by regional organizations in the Global South comparatively underexplored. This study seeks to address this lacuna by analyzing the Organisation of Turkic States (OTS) – a Eurasian regional entity comprising Azerbaijan, Kazakhstan, Kyrgyzstan, Türkiye, and Uzbekistan – as a paradigmatic case of how middle powers institutionalize digital diplomacy within cultural and civilizational frameworks.

The OTS constitutes a theoretically significant case for several reasons. First, it exemplifies a regional organization that has experienced rapid institutional development, evolving from a cultural forum established in 2009 into a multidimensional security, economic, and technological bloc with articulated ambitions for digital sovereignty. Second, despite encompassing states with heterogeneous levels of digital infrastructure and diverse political systems, the organization has achieved a noteworthy degree of coordination in strategic communication and information operations. Third, the OTS operates within a highly contested geopolitical context, strategically navigating between Russian informational dominance in Central Asia, Chinese technological influence, and Western normative regimes concerning internet governance.

Our central argument is that the OTS has developed a distinctive model of civilizational digital diplomacy that prioritizes collective identity construction over universalist values, technological sovereignty over global interoperability, and regime security over liberal democratic norms. This model crystallized during and after the Second Karabakh War (2020), when coordinated Turkish-Azerbaijani

information operations demonstrated the strategic value of joint digital campaigns framed through Turkic cultural solidarity.

The article proceeds as follows. Section 2 establishes the theoretical framework, situating OTS digital diplomacy within literatures on digital diplomacy, strategic communication, and regional organizations. Section 3 traces the historical evolution of OTS digital diplomacy from the 2015 Astana Summit through the 2024 Bishkek Summit. Section 4 analyzes the institutional architecture, including the Joint Media Platform, Digital Economy Partnership Agreement, and proposed Digital Monitoring Center. Section 5 examines the cultural dimensions of digital diplomacy, including heritage preservation and educational content harmonization. Section 6 discusses the tension between digital sovereignty aspirations and implementation constraints. Section 7 concludes with theoretical implications and avenues for future research [OTS 2024].

Digital Diplomacy and Soft Power in the Turkic World

In recent years, efforts to revitalize and consolidate linguistic and cultural ties among Turkic-speaking nations have intensified. The Organization of Turkic States (OTS), formerly the Turkic Council, has played a central role in facilitating cooperation across this transnational community. Through a combination of educational programs, cultural exchanges, and political coordination, the OTS has sought to reconstruct a shared sense of heritage and identity. A particular focus of these initiatives has been the harmonization of Turkic languages across national boundaries, aiming to address the fragmentation engendered by historical political divisions. By promoting standardized linguistic practices, these efforts aspire to enhance mutual intelligibility and foster deeper intercultural cohesion (Popkova & Sergi, 2022).

Concurrently, the adoption of digital technologies has emerged as a critical enabler of these initiatives. Digital education platforms provide an innovative means of overcoming geographical and linguistic barriers that have historically constrained cultural integration. Such platforms allow learners across the Turkic world to engage with standardized language instruction, access shared cultural resources, and participate in virtual exchanges, thereby reinforcing a sense of collective identity within a framework of diversity. The widespread uptake of these tools – particularly in Türkiye, Kazakhstan, and Azerbaijan – highlights the capacity of digital infrastructure to serve as a conduit for cultural diplomacy and transnational community-building (Popkova & Sergi, 2022).

Education has long functioned as a strategic instrument of soft power, enabling states to shape international perceptions, cultivate transnational networks, and project cultural influence beyond conventional diplomatic channels. In the contemporary era of digital interconnectivity, digital education has emerged as a critical modality of soft power projection, allowing states to transcend territorial limitations and engage global audiences with unprecedented reach. For Turkic nations, digital education constitutes both a mechanism of regional integration and a tool for enhancing collective geopolitical influence. By promoting educational cooperation – particularly in language and cultural programs – these states actively construct a shared identity and foster solidarity grounded in common linguistic and cultural heritage (Astana Times, 2025).

From an international relations perspective, these initiatives exemplify how regional organizations can operationalize cultural diplomacy within a digital framework. As Tabaeva, Ozawa, Durrani, and Thibault (2021) argue, digital education strengthens political, cultural, and social linkages, facilitating cooperation that extends beyond traditional state-to-state diplomacy. Programs emphasizing shared historical, linguistic, and cultural roots reinforce collective identity formation and generate normative cohesion, which, in turn, can enhance regional stability and cooperation. Johanson and Csató (2015) highlight that initiatives foregrounding the common linguistic heritage of Turkic languages can foster transnational unity and cooperative behavior, creating a platform for coordinated policy and strategic alignment.

Leveraging digital platforms, these educational programs achieve a dual effect: they provide widespread access to standardized language and cultural curricula across Türkiye, Azerbaijan, Uzbekistan, and Kazakhstan, while simultaneously cultivating a transnational consciousness anchored in shared heritage. In this sense, digital education operates not merely as a pedagogical tool but as a deliberate instrument of soft power and cultural geopolitics, shaping regional narratives, reinforcing collective identity, and enhancing the international agency of Turkic nations within the evolving architecture of Eurasian regionalism [Alimbekov 2025].

Digital Education, Linguistic Integration, and Cultural Cooperation

E-learning platforms constitute a strategic instrument of soft power for Turkic nations, operationalizing language education as a means of regional integration and transnational influence. By providing accessible online courses in the languages of neighboring Turkic states, these platforms enable students to acquire linguistic competencies that transcend national boundaries. For example, learners in Türkiye can study Azerbaijani, Kazakh, or Uzbek, while students in Kazakhstan or Uzbekistan can engage with Turkish-language instruction through equivalent digital programs. As Taskiran (2019) observes, telecollaboration – utilizing tools such as video conferencing, online discussion forums, and synchronous communication – enhances language acquisition by facilitating real-time interaction with native speakers. This model of digitally mediated learning emphasizes communicative competence and interactive engagement, thereby serving not only educational but also strategic objectives in cross-border cultural diplomacy.

Telecollaboration extends beyond language instruction, functioning as a vehicle for cultural exchange and the cultivation of regional identity. Through sustained, real-time engagement with peers from other Turkic nations, students gain exposure to diverse cultural practices, historical narratives, and social norms, fostering nuanced understandings of shared heritage. In this sense, digital education operates as a mechanism of identity formation, promoting cohesion, solidarity, and normative alignment across the Turkic world. By linking educational initiatives to collective cultural consciousness, e-learning platforms reinforce the soft power capacity of Turkic states, enabling them to shape regional narratives, foster cooperative networks, and consolidate their influence within a framework of Eurasian regionalism (Taskiran, 2019).

Ultimately, the strategic deployment of digital language platforms exemplifies how middle powers can leverage technology to pursue both pedagogical and geopolitical objectives. By integrating language, culture, and digital infrastructure, Turkic nations employ education as a multidimensional instrument of cultural diplomacy, simultaneously enhancing mutual understanding, strengthening regional integration, and projecting soft power on a transnational scale.

A central challenge in realizing these objectives has been the historical fragmentation of Turkic languages due to political interventions. During the Soviet era, many Turkic languages were transcribed using the Cyrillic alphabet as part of broader efforts to impose a unified Soviet identity (Johanson & Csató, 2015). This divergence created enduring communication barriers, as each state maintained distinct orthographic systems – Türkiye adopted the Latin alphabet in the 1920s, while Kazakhstan, Uzbekistan, and Azerbaijan relied on Cyrillic well into the late twentieth century.

In response, recent efforts toward alphabetic standardization have gained momentum. Kazakhstan and Uzbekistan, for example, have initiated transitions to the Latin script, aiming to harmonize their orthographies with those of other Turkic nations. Johanson and Csató (2015) argue that the adoption of a common alphabet mitigates historical linguistic fragmentation, enhances cross-border communication, and creates new opportunities for regional collaboration. When coupled with digital education platforms, this linguistic harmonization significantly strengthens the soft power capacity of Turkic nations by fostering shared cultural understanding and facilitating transnational networks.

Collectively, these initiatives illustrate how middle powers can leverage digital infrastructure, education, and linguistic standardization to pursue both pedagogical and geopolitical objectives.

By integrating language, culture, and technology, Turkic nations employ digital education as a strategic instrument of cultural diplomacy, simultaneously enhancing regional integration, projecting soft power, and consolidating their influence within the evolving architecture of Eurasian regionalism.

Digital education platforms offer a strategic response to the challenges posed by linguistic diversity in the Turkic world, providing standardized language courses that are accessible across national borders. According to Popkova and Sergi (2022), such platforms can play a pivotal role in fostering linguistic cohesion, either by offering instruction in a unified Turkic language or by facilitating mutual intelligibility through standardized curricula. This approach enables students to maintain proficiency in their native languages while simultaneously acquiring the skills necessary to communicate effectively with speakers of other Turkic languages. In this way, digital education functions as a bridge between the fragmented linguistic landscape of the region and the broader objective of regional integration.

The success of these initiatives is closely linked to digital literacy. As Aydin and Erol (2021) observe, the COVID-19 pandemic accelerated the integration of digital tools in education, making digital competence an essential prerequisite for effective learning. For Turkic nations, equipping both educators and students with the necessary digital skills is critical for the implementation of cross-national educational programs. Digital literacy training not only enables instructors to develop more effective pedagogical strategies but also empowers students to engage fully with online resources, thereby supporting the overarching goal of linguistic and cultural integration (Fatmanur, 2023).

Beyond linguistic proficiency, digital platforms facilitate meaningful cultural exchange by providing learners with access to the historical, social, and cultural traditions of other Turkic nations. Machado and Lussana (2008) emphasize that e-learning can serve as a vehicle for disseminating cultural knowledge, allowing students to explore their own heritage while gaining insight into the histories and customs of neighboring communities. This dimension of digital education is particularly salient in the context of the Turkic world, whose shared historical trajectory – from the rise of the Göktürks in the sixth century to the spread of Islam across Central Asia – underscores the potential of digital tools to reinforce collective identity, mutual understanding, and regional solidarity.

The Organisation of Turkic States (OTS), with Kazakhstan and Uzbekistan at the forefront, has recently intensified efforts to enhance regional collaboration in green energy, digital transformation, and smart innovation. At the 2025 Gabala Summit, member state leaders underscored the strategic importance of integrating artificial intelligence, green technologies, digital infrastructure, and smart manufacturing systems to "enhance productivity, sustainability, and regional competitiveness through coordinated innovation and capacity-building initiatives" (OTS, 2025). In line with these priorities, the OTS has initiated concrete measures in sustainable finance and environmental governance.

A landmark development occurred at the 2024 Bishkek Summit, where the OTS established the "Turkic Green Finance Council," with Kazakhstan's Astana International Finance Centre assuming a leadership role. The Council is tasked with strengthening member states' capacity to develop green financial instruments and attract sustainable investments (AIFC, 2024). The inaugural Council meeting, held in September 2025, brought together representatives from financial regulators, ministries of economy and finance, and regional stock exchanges, signaling a shift from declaratory commitments to the institutionalization of mechanisms for sustainable finance.

The OTS's "Turkic Green Vision" articulates a comprehensive framework for regional environmental and technological cooperation. Key initiatives include the Turkic Renewable Energy Alliance, designed to promote renewable energy development; the Green Middle Corridor, envisioned as a sustainable transport network; the Turkic Biodiversity and Ecosystem Program, aimed at facilitating environmental conservation; and the Climate Change and Educational Awareness Program, which focuses on climate studies and community resilience to natural disasters (OTS, 2025). Collectively, these initiatives reflect the OTS's ambition to position environmental sustain-

ability and technological innovation at the center of regional governance, fostering coordinated development and enhancing the collective strategic capacity of Turkic states in the face of global ecological and technological challenges.

Digital Transformation, AI Cooperation, and Institutionalization of Digital Governance

Artificial intelligence (AI) and digitalization have emerged as central pillars of regional integration within the Organisation of Turkic States (OTS). At the 2024 Bishkek Summit, General Secretary Kubanychbek Omuraliev emphasized OTS initiatives in e-commerce, technopark development, digital infrastructure, and cybersecurity, proposing the establishment of a Turkic AI network and advocating for expanded investment in AI-driven innovation and education (Trend, 2024). A key component of this strategy is the development of the Trans-Caspian corridor, leveraging digitalization and AI to streamline customs procedures and facilitate more efficient cross-border trade.

Within this framework, Kazakhstan and Uzbekistan have assumed leadership roles. In a public address in September 2025, Kazakhstan's President Tokayev positioned digitalization and AI at the core of the national development agenda, articulating a vision to transform Kazakhstan into a "fully digital country" within three years (Report.az, 2025). To operationalize this vision, Kazakhstan is establishing a dedicated ministry for digitalization and AI, enacting legal frameworks for AI governance, and developing a digital currency – the digital tenge – which enhances transaction transparency, traceability, and efficiency while simultaneously advancing anti-corruption objectives by preventing the diversion of earmarked funds.

Complementing these structural and regulatory measures, the Kazakhstani government is also integrating AI and digitalization into the national education system, aiming to cultivate a digitally literate workforce capable of sustaining innovation and supporting the country's transition toward a fully digital economy. Collectively, these initiatives illustrate how the OTS, through the leadership of its member states, is leveraging AI and digital technologies not only as drivers of economic modernization but also as instruments of regional cooperation, governance innovation, and strategic capacity-building.

Uzbekistan has also prioritized digitalization and artificial intelligence (AI) as central components of its national reform agenda. Through the "Digital Uzbekistan 2030" program, the government is digitizing public services and aims to train up to one million specialists by 2027, thereby building human capital to support the country's technological transition. Within the OTS framework, Kazakhstan has played a leading role, not only hosting the inaugural Green Finance Council but also proposing its establishment. The country has further advanced intra-OTS cooperation in AI and digital innovation, including the proposal of a Digital Monitoring Center to facilitate coordination and oversight among member states. These developments suggest that OTS summits will continue to emphasize AI, digital innovation, and sustainable development as strategic priorities for the foreseeable future.

Beyond technological modernization, the OTS functions as a collective platform for information exchange, communication, and digital diplomacy. The Organisation's strategic vision, as articulated in the Turkic World Vision – 2040 document, integrates communication, media, and cultural initiatives with forward-looking projections in information and communication technologies (ICT). The framework emphasizes harmonization of member state legislation on ICT, coordinated e-government initiatives, and the development of e-services across critical sectors such as education, health, transportation, and tourism.

Cybersecurity is accorded a central role within this agenda, with the OTS aiming to influence regional security outcomes through collaboration with international cybersecurity centers. Additionally, the Organisation seeks to strengthen research and innovation capacities through university-led space studies and scientific initiatives, reflecting a long-term commitment to technological leadership, capacity-building, and knowledge integration across the Turkic world (Turkic World Vision – 2040). Collectively, these efforts underscore the OTS's dual function as both a platform for

regional governance and a strategic instrument of digital diplomacy, enabling member states to harmonize policy, coordinate innovation, and project influence within Eurasia and beyond.

Within the domain of information and media, the Organisation of Turkic States (OTS) prioritizes the preservation and promotion of the shared values, traditions, and historical heritage of its member nations. Key objectives include enhancing dialogue between public communication institutions and private media organizations, fostering collaboration in emerging media platforms, leveraging the expertise of media professionals, and cultivating an environment conducive to high-quality journalism. Innovation is emphasized across both traditional and digital media formats, reflecting the Organisation's commitment to integrating technological advances into the communication landscape.

In addition, the OTS actively supports media productions – such as television series, films, digital content, animations, and documentaries – that highlight the collective history, culture, and values of Turkic nations. Initiatives include the establishment of joint production companies, research and development centers, and entrepreneurial hubs focused on digital media, alongside targeted investment in artificial intelligence studies for media applications. These efforts aim to reach broader audiences while reinforcing shared cultural narratives and enhancing regional media capacities (Turkic World Vision – 2040).

The institutionalization of digital diplomacy within the Turkic cooperation framework was formally recognized during the Fifth Turkic Council Summit, held in Astana in September 2015 under the theme "Cooperation in Media and Information." At this summit, the Media Platform for Turkish-Speaking Countries was established with the explicit mandate to foster common perceptions and policy positions among member states, thereby developing unified reflexes in global political discourse (OTS, 2021). Collectively, these initiatives reflect the OTS's strategic approach to media and digital diplomacy, positioning information, communication, and cultural production as central instruments of regional integration, identity formation, and transnational influence.

The Eleventh Summit of the Organisation of Turkic States (OTS), convened in Bishkek on 6 November 2024 under the theme "Empowering the Turkic World: Economic Integration, Sustainable Development, Digital Future, and Security for All," marked a pivotal moment in the institutional consolidation of digital diplomacy within the Turkic cooperation framework (OTS, 2024). The summit generated an extensive set of digital governance initiatives that collectively signal the organization's transition from declaratory commitments to structured digital cooperation.

Among the most significant outcomes was the Digital Economy Partnership Agreement, signed by all member states. The agreement seeks to promote "seamless digital trade and transformation" across the OTS region, establishing regulatory foundations for cross-border data flows, digital payments, and interoperable e-government services (OTS, 2024). Although primarily economic in orientation, the framework also provides the technological and institutional infrastructure necessary for coordinated diplomatic engagement in the digital domain.

Another notable initiative was the Memorandum of Understanding on the Turkic Large Language Model, which aims to develop a shared artificial intelligence language system for Turkic states. This initiative addresses the cultural and linguistic dimensions of digital sovereignty by reducing reliance on predominantly English-centered AI ecosystems and by strengthening the digital representation of Turkic languages in emerging technologies (Astana Times, 2024).

In addition, the summit designated Bishkek as the "Digital Capital of the Turkic World" for 2025, institutionalizing a rotating leadership model for digital innovation within the organization (OTS, 2025). Similar in concept to initiatives such as the European Capitals of Culture, this designation is intended to stimulate technological development, policy coordination, and digital ecosystem building among member states.

Collectively, these initiatives illustrate the OTS's growing ambition to position digital governance, technological innovation, and AI cooperation at the center of its regional integration agenda, thereby

strengthening the organization's capacity to operate as a coordinated actor within the evolving landscape of global digital diplomacy.

Conclusion. This analysis has demonstrated that the Organisation of Turkic States has constructed a sophisticated, multi-layered architecture for digital diplomacy and strategic communication that challenges conventional understandings of regional organizations' role in cyberspace. The OTS case reveals several key findings with theoretical and policy implications.

First, the OTS exemplifies how regional organizations can evolve from cultural cooperation mechanisms into operational actors in information warfare and digital governance. The Joint Media Platform, proposed Digital Monitoring Center, and Turkic AI Network represent institutional innovations that enable collective action in cyberspace without requiring formal alliance structures or democratic governance prerequisites.

Second, the OTS model of civilizational digital diplomacy offers a distinctive alternative to both Western liberal approaches and authoritarian state-centric models. By framing digital cooperation through Turkic cultural heritage, historical continuity, and civilizational resurgence narratives, the OTS legitimizes technological sovereignty agendas and regime security measures that might otherwise face international criticism. The Turkic World Vision 2040's mandates for joint online encyclopedias, digital heritage preservation, and educational content harmonization demonstrate how cultural policy and digital infrastructure become mutually constitutive.

Third, the Second Karabakh War (2020) served as a catalytic event that institutionalized previously informal cooperation patterns. The demonstrated effectiveness of coordinated information operations – combining drone warfare visualization, synchronized narrative construction, and diaspora mobilization – provided both strategic validation and institutional momentum for deeper integration. This suggests that warfare and conflict can accelerate digital diplomacy institutionalization in ways that peacetime cooperation cannot.

Fourth, the OTS's digital sovereignty agenda – encompassing data localization, platform alternatives to Western systems, and indigenous AI development – reflects broader trends in the Global South toward technological decolonization. However, the organization's emphasis on "domestic and national digital applications" and resistance to Western "digital fascism" also serves to legitimize authoritarian content control and surveillance practices.

The limitations of OTS digital diplomacy should not be overlooked. Capacity disparities between member states, persistent dependency on Russian and Chinese technological infrastructure, and the absence of formal collective defense obligations constrain the organization's effectiveness. Moreover, the instrumentalization of cultural heritage for geopolitical purposes risks essentializing identity and marginalizing non-Turkic populations within member states.

Future research should examine how OTS digital diplomacy initiatives interact with competing regional frameworks, particularly the Shanghai Cooperation Organization's cyber governance agenda and the European Union's digital partnership offers. Additionally, the reception of OTS digital heritage projects by diverse populations within member states – including non-Turkic minorities and secular urban youth – requires empirical investigation.

The OTS case ultimately suggests that the future of digital diplomacy will be characterized not by convergence on a single liberal model but by the proliferation of regional approaches embedding distinct civilizational values, historical narratives, and governance preferences. Understanding these emergent formations is essential for navigating an increasingly fragmented digital geopolitical landscape.

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DOI https://doi.org/10.30525/2592-8813-2026-2-40

ACTIVITIES BY PRESIDENT OF THE REPUBLIC OF AZERBAIJAN ILHAM ALIYEV TOWARDS RESTORATION OF THE TERRITORIAL INTEGRITY OF THE REPUBLIC OF AZERBAIJAN

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Abstract. The article discusses the activities of the President of the Republic of Azerbaijan Ilham Aliyev in resolving the long-standing conflict between Armenia and Azerbaijan. The work carried out within the framework of international and regional organizations, active participation in security institutions are examined. The success achieved in the military-diplomatic and information space in the Second Karabakh War is discussed. The Republic of Azerbaijan has suffered from the occupation of Armenia for nearly 30 years, and about a million civilians have become internally displaced persons. The author also discusses the state program prepared by the head of state Ilham Aliyev to improve the living conditions of internally displaced persons. Special work has been carried out with the support of the Heydar Aliyev Foundation since 2008 to convey the truths of the conflict – Armenia's acts of genocide, aggression and terrorist policy – to the world community. The research used methods such as content analysis, synthesis, comparative analysis, analogy, and systematization.

Key words: international law, historical justice, genocide, aggressive policy, The Second Karabakh War, Ilham Aliyev, territorial integrity.

Introduction. From the time the Republic of Azerbaijan regained its independence until the Second Karabakh War, the main priority in our foreign policy was the restoration of Azerbaijan's territorial integrity and sovereignty. During his speech at the inauguration ceremony of the President of the Republic of Azerbaijan (October 31, 2003), Ilham Aliyev said: "The Armenia-Azerbaijan, Nagorno-Karabakh conflict is the most serious problem for our country. We have been living in a ceasefire regime for many years. Unfortunately, the activities of the OSCE Minsk Group, which is directly involved in this issue, have not yielded any results yet. We still do not lose hope. We still hope that the co-chairs will deal with this issue more seriously and responsibly. This issue must be resolved. This problem can only be resolved on the basis of several principles and international law: the lands of Azerbaijan must be liberated from occupation, more than a million refugees and internally displaced persons must return to their homelands, and the territorial integrity of our country must be restored. Azerbaijan will never reconcile itself to this situation, to the fact that its lands remain under occupation. Everyone should know that despite our being supporters of peace, despite our desire for the war not to resume and for this issue to be resolved peacefully, our patience is also is not inexhaustible. Azerbaijan will liberate its native lands at any cost" (Aliyev I. H., 2003).

Meetings between the presidents of Azerbaijan and Armenia continued throughout the conflict. Examples include the following meetings:

The meeting held in St. Petersburg on June 5, 2008, and in Moscow on November 2; the declaration jointly signed by the presidents of Russia, Azerbaijan, and Armenia on November 2, 2008 at the "Maindorf" castle near Moscow. 28 January 2009 in Zurich, 7 May in Prague, 4 June in St. Petersburg, 17–18 July in Moscow, 8-9 October in Chisinau, 22 November in Munich, 25 January 2010 in Sochi, 17 June in St. Petersburg, 27 October in Astrakhan, 5 March 2011 in Sochi, 24 June in Kazan, 25 January 2012 in Sochi, 19 November 2013 in Vienna, 10 August 2014 in

Sochi, 4 September in Newport, 27 October in Paris and 19 December 2015 in Bern Azerbaijan and the meeting of the presidents of Armenia.

After the April battles in 2016, 3 more meetings were held: in Vienna on May 17 and in St. Petersburg on June 20, and after a long break, in Geneva on October 16, 2017. However, the trilateral meetings of the parties to the conflict, either directly or with the participation of a mediator (in particular, The Russian Federation), did not yield any results. The occupying Armenia was using the negotiation process to gain time and was trying to maintain the status quo in the occupied territories.

In this regard, the activities within the framework of international and regional organizations towards the resolution of the conflict can be considered more successful. The institutions of the United Nations, the Organization of Islamic Cooperation, the Organization for Security and Cooperation in Europe, the Council of Europe, and the European Union adopted documents on the conflict. These documents created a legal basis for the Republic of Azerbaijan to ensure its territorial integrity at a later stage.

Discussion. President Ilham Aliyev's activities within international and regional organizations. Speaking at the 59th session of the UN General Assembly held in September 2004, President of the Republic of Azerbaijan Ilham Aliyev stated that the 4 resolutions adopted by the UN Security Council on the Armenia-Azerbaijan conflict had not yet been implemented and put forward the creation of a working mechanism for their implementation as a priority. During the visit of the Special Representative of the Chairman of the OSCE Parliamentary Assembly on the conflict in Nagorno-Karabakh, Goran Lennmarker to Azerbaijan on February 4, 2004, President Ilham Aliyev noted that in addition to the OSCE Minsk Group, which is the main mediator in the process of resolving the conflict, it is of great importance to strengthen the activities of other international organizations – the OSCE Parliamentary Assembly, the Council of Europe and the European Union.

At the next spring session of the Parliamentary Assembly of the Council of Europe, Azerbaijani President Ilham Aliyev made a detailed speech about Armenia's territorial claims and military aggression and created a broad perception of this conflict in the European community. In his speech, he emphasized that: *"... Azerbaijan will never agree to the loss of its territory. The norms of international law must be taken as the basis for resolving the issue. Azerbaijan respects the territorial integrity of all countries in the world and demands that it be treated with the same attitude. Our territorial integrity must be restored. The occupying forces of Armenia must withdraw from the occupied territories. Refugees and displaced persons must be given the opportunity to return to their homelands. In the 21st century, we must not allow one member state of the Council of Europe – Armenia – to occupy the territories of another member state of the Council of Europe – Azerbaijan"* (Ahmadov, 2015, p. 111–112).

Azerbaijani President Ilham Aliyev has repeatedly noted in his speeches that Armenians have already determined their own destiny. Now they are trying to bring these two principles – territorial integrity and self-determination – into conflict with each other. The Armenian state already exists. A second Armenian state cannot be created on the territory of Azerbaijan.

Speaking at the 59th session of the UN General Assembly held in September 2004, Azerbaijani President Ilham Aliyev stated that the 4 resolutions adopted by the UN Security Council on the Armenia-Azerbaijan, Nagorno-Karabakh conflict have not yet been implemented and put forward the creation of a working mechanism for their implementation as a priority. At the same time, the Azerbaijani head of state stated that "the improved Security Council should be more comprehensive, more responsible and democratic, its working methods should be more transparent, and a more operational response should be provided to the new threats, risks and dangers of the 21st century". In addition, on October 29 of the same year, at the session of the UN General Assembly, at the initiative of the Azerbaijani delegation, the issue "The situation in the occupied territories of Azerbaijan" was put on the agenda of the meeting. Resolutions entitled "The Situation in the Occupied Territories

of Azerbaijan" were adopted at the 98th plenary meetings of the 60th session of the UN General Assembly held on September 7, 2006, and the 86th plenary meetings of the 62nd session held on March 14, 2008.

Later, at the 98th plenary meeting of the 60th session of the UN General Assembly held on September 7, 2006 and at the 86th plenary meetings of the 62nd session held on March 14, 2008, resolutions entitled **"The situation in the occupied territories of Azerbaijan"** were adopted. These documents condemned the settlement of Armenians in the occupied territories of Azerbaijan, the arson in those territories, and, referring to the known 4 resolutions of the Security Council, demanded the immediate, complete and unconditional withdrawal of Armenian armed forces from the occupied territories of Azerbaijan. At the same time, the resolutions expressed respect for the sovereignty and territorial integrity of Azerbaijan, as well as reaffirmed the right of Azerbaijanis expelled from their lands to return to their homelands. Thus, the mutual relations that arose with the accession of the Republic of Azerbaijan to the UN membership expanded further, turned into multifaceted cooperation and played an important role in the development of Azerbaijan as an independent state and in taking its appropriate place in the international community. At the same time. Azerbaijan has also contributed to the more effective functioning of this influential international organization and the preservation of international security and peace.

On May 8, 2008, the "Justice for Khojaly" campaign was established on the initiative of Leyla Aliyeva, the General Coordinator for Intercultural Dialogue of the Youth Forum of the Organization of the Islamic Conference. The aim of this international information and agitation campaign is to inform the world community about the Khojaly genocide, to achieve a moral and political assessment of the massacre and to commemorate the victims of this bloody massacre (Tapdıghoglu, 2015, p. 373). This campaign was successfully implemented in 30 countries of the world. In February 2010, the anniversary of the Khojaly genocide was already celebrated in more than 100 places around the world with the support of the Heydar Aliyev Foundation (Ahmadov, 2014, p. 8).

The Republic of Azerbaijan was one of the first 47 countries elected to the Human Rights Council established as a result of the UN reforms and contributed to the work of this body with its effective activity during the membership period covering 2006-2009. As a result of his active participation in the Council, the Permanent Representative of the Republic of Azerbaijan to the UN Office in Geneva and other international organizations was elected as the Rapporteur of the Vice-Chair of the Human Rights Council for 2008-2009.

Activities of the State Committee for Refugees and Internally Displaced Persons (IDPs)

One of the issues that concerned the head of state most, of course, was the improvement of the living conditions of internally displaced persons who had to leave their homeland as a result of the occupation. The State Committee for Refugees and Internally Displaced Persons of the Republic of Azerbaijan (hereinafter referred to as the Committee) is the central executive body implementing state policy in the field of placement, settlement, repatriation, social protection of refugees and internally displaced persons (hereinafter referred to as refugees and internally displaced persons) as a result of the Armenian-Azerbaijani, Nagorno-Karabakh conflict, and improvement of their social, housing and living conditions in the territories liberated from occupation. The Committee is located in Baku. The main tasks of the Committee include:

1) to participate in the formation of state policy in the field of increasing the employment of refugees and internally displaced persons, reducing poverty and solving social problems, and to ensure its implementation;

2) to prepare drafts of relevant state programs and organize their implementation in order to improve the living conditions of refugees and internally displaced persons (E-qanun.az, 2005).

According to the legislation of the Republic of Azerbaijan, persons who were forced to leave their permanent places of residence in the territory of the Republic of Azerbaijan and moved to another

place within the country as a result of foreign military aggression, occupation of certain territories or constant fire are considered internally displaced persons. It should be noted that during the occupation, about 1 million civilians were forced to settle in semi-detached houses and tents in various regions of Azerbaijan, as well as in the capital Baku and its surrounding areas. The social policy of the national leader of the Azerbaijani people, Heydar Aliyev, was addressed precisely to internally displaced persons. From the moment the oil strategy laid down by Heydar Aliyev began to bear fruit, the first funds were directed to improving the housing and living conditions of refugees and internally displaced persons, and out of the 12 tent camps that existed in Azerbaijan, 5 in the Bilasuvar region were liquidated in 2003, 4 in the Barda and Agjabedi regions in 2006, and 3 in the Saatli and Sabirabad regions in 2007. In accordance with the relevant decree of the President of the Republic of Azerbaijan, new settlements were built. In accordance with the State Program, new settlements were built and the last tent camps in the republic were liquidated in December 2007. Thus, the unfavorable living conditions of 3,110 families (11,133 people) were improved (Idp.gov.az, 2026).

As a result of the targeted policy implemented by the President of the Republic of Azerbaijan, on April 26, 2012, Azerbaijan was elected a full member of another influential international organization – the Executive Committee of the United Nations High Commissioner for Refugees. The liquidation of 12 tent camps and settlements consisting of freight wagons on the railway was fully completed in 2007, and the liquidation of 16 finnish-style settlements was fully completed in 2016, and the resettlement of internally displaced families living in deplorable conditions to newly built settlements was ensured. In total, during 2001-2018, 102 modern settlements and multi-storey buildings with an area of 3.5 million square meters and complete social and technical infrastructure were built for refugees and internally displaced persons in more than 30 cities and regions of the republic with funds allocated from the State Oil Fund and other sources. Of these, 97, or 95 percent, with an area of 3.3 million square meters, were built in the last 15 years. A total of 7.1 billion manats were spent to solve the social problems of refugees and internally displaced persons during 1993-2018. Of this:

– 3.4 billion manats were from the state budget,

– 2.3 billion manats from the State Oil Fund,

– 1.4 billion manats from international financial institutions and international humanitarian organizations operating in our country. 85 percent of these funds, or 6.1 billion manats, were used in the last 15 years (Idp.gov.az, 2026).

Increasing the influence of the Republic of Azerbaijan in the world and its election as a non-permanent member of the UN Security Council.

The Security Council, as the UN body responsible for ensuring peace and security in the world, consists of 5 permanent and 10 non-permanent members. It should also be noted that, according to Rule 142 of the Rules of Procedure of the UN General Assembly, 5 of the 10 non-permanent members of the UN Security Council are renewed every year. In 2011, 5 non-permanent members of the Security Council were to be elected for 2012-2013. Candidates for the elections for non-permanent membership of the UN Security Council are nominated by groups called regional groups. Thus, five countries from Africa and the Asia-Pacific region immediately nominated their candidacies. These were Kyrgyzstan, Mauritania, Morocco, Pakistan and Togo. They fought for the seats vacated by Gabon, Lebanon and Nigeria on December 31, 2011. By the end of the year, three countries from the Eastern European group – Azerbaijan, Hungary and Slovenia – had claimed the seat occupied by Bosnia and Herzegovina. According to the regulations, elections for non-permanent membership are held by secret ballot. With the exception of Azerbaijan, Kyrgyzstan and Guatemala, nine candidate countries had already been non-permanent members of the UN Security Council before.

Azerbaijan, which competed with Slovenia and Hungary, which nominated their candidacy from the Eastern European group, gained an unconditional advantage over Hungary and then Slovenia in the 16th round of the elections, and in the 17th round, it received 155 votes, which is more than

the 129 votes required for victory. In the 16th round of the previous voting, Azerbaijan received 116 votes, while Slovenia received only 77 votes. Before the final round of voting, Slovenian Foreign Minister Samuel Zbogar announced that his country had withdrawn its candidacy. In the final round, 155 countries voted in favor of Azerbaijan, 24 countries abstained, and 13 more countries voted for Slovenia. According to the results of other votes, the new non-permanent members of the UN Security Council were Guatemala, Morocco, Togo, and Pakistan.

Thus, Azerbaijan won a convincing victory in the elections for non-permanent membership of the UN Security Council for 2012-2013 held on October 24, 2011, gaining the support of 155 out of 193 UN member states. Azerbaijan's non-permanent membership of the UN Security Council will begin on January 1, 2012 and will last until December 31, 2013. In addition, within two years, Azerbaijan will alternately perform the functions of the chairman of the Security Council for 1 month in May 2012 and September 2013. Currently, the Ministry of Foreign Affairs of Azerbaijan is conducting preparatory work for the 2-year activity in the Security Council and certain events are planned in accordance with the Council's agenda. In addition, it is reported that Azerbaijan, as a member of the UN Security Council, is preparing to put forward new projects in areas consistent with its experience, especially dialogue between civilizations, assistance to economically less developed countries, and other humanitarian issues, during the next two years.

Azerbaijan's admission to the UN Security Council as a non-permanent member is a historic event and should be seen as an indicator of Azerbaijan's growing influence in the international community. At the same time, Azerbaijan is constantly developing it in the context of interstate civil relations by establishing bilateral and multilateral relations with world powers. Azerbaijan is the first country in the South Caucasus and Central Asia region to be elected as a member of the UN Security Council. It is also symbolic that Azerbaijan achieved this historic victory on the day the UN was founded – October 24. At the same time, the admission to the UN Security Council as a non-permanent member is one of the greatest achievements in the history of Azerbaijan's diplomacy and should be considered as a clear proof of the country's growing political influence on a global scale in recent years. It is no coincidence that this success was achieved on the 20th anniversary of the restoration of independence. Thus, Azerbaijan, as a state that has been developing stably over the past 20 years, has achieved high economic indicators and has won the sympathy of the world community with its actions in international politics, has been elected as a member of the most prestigious organization at the international level as a result of all these successes.

Activities of President Ilham Aliyev within the framework of security institutions

Munich Security Conference – a transparent platform for resolving the Armenia-Azerbaijan conflict

Transatlantic security policy and the defense of Europe are among the main topics of the Munich Security Conference (MSC). The MSC aims to organize discussions on these and other key aspects of global defense and security policy through the Defense Program. In order to reflect the complex international security landscape, the activities of the Munich Security Conference are carried out under five programs: ***defense, global order, human security, sustainable development and technology.*** These programs deal with traditional issues such as growing security challenges, as well as provide intellectual contributions to all events and publications of the Conference. In these five program areas, the MSC works with renowned partners from all over the world. On February 15, 2020, during a panel discussion on the Armenia-Azerbaijan conflict within the framework of the Munich Security Conference, President Ilham Aliyev explained the history of Karabakh, Armenia's ethnic cleansing, genocide, and terrorist policy with historical facts, thereby once again conveying Azerbaijan's rightful position to the whole world. At important international meetings, he voiced the idea that *"the territorial integrity of Azerbaijan has the same value as the territorial integrity of any other country,"* and stated that we would never agree to the fact of occupation and the creation of a second Armenian state on the territory of our country (President.az, 2020).

President Ilham Aliyev has made many initiatives in the international arena. As he himself said, every country should fully carry out its activities in any organization, that is, this activity, especially the chairmanship, should not be of a formal nature. In the year when the war began, Azerbaijan chaired two influential organizations – the Cooperation Council of Turkic-Speaking States and the Non-Aligned Movement. Although the chairmanship of the Cooperation Council of Turkic-Speaking States is based on the principle of rotation, the chairmanship of the Non-Aligned Movement is through elections. Azerbaijan's position during the negotiations remained unchanged. Because our position was based on both historical justice and international law. This position was to resolve the conflict within the framework of territorial integrity. The principle of territorial integrity of Azerbaijan has never been a subject of compromise.

The Second Karabakh War: Successes in the military-diplomatic and information space. The history, causes, course and results of wars taking place in the world are studied from various aspects. A new war has been added to the history of war. This is the Second Karabakh War, which resulted in the victory of the Republic of Azerbaijan. The Second Karabakh War can also be called a hybrid war. Thus, this war was fought with new generation weapons, using not only modern equipment and ammunition, but also new military rules were applied. From this point of view, this organized war can be considered the main success of the Azerbaijani Armed Forces during the period of independence (Ahmadov, 2025, p. 48).

The Second Karabakh War was one of the main topics on the international agenda at that time. The main reason for this was that it coincided with the Pandemic period and attracted all the attention. The world press showed different reactions to it, and different states directly expressed their positions. From this point of view, the positions of the regional countries Russia, Turkey and Iran, as well as France, the USA and Israel, can be considered. Although their positions did not have much impact on the course of the war (because new realities were emerging and changing directly in the combat zone), they could not fail to influence the future phase of bilateral relations with Azerbaijan and Armenia in the post-conflict period.

President Ilham Aliyev participated in a panel discussion on "Defining the Economic Identity of Eurasia" held within the framework of the annual meeting of the World Economic Forum on January 20, 2026. At the meeting, the head of state expressed his position on regional security, the current state of the process of normalizing Azerbaijani-Armenian relations, the Washington agreements and their implementation process, steps taken to build an environment of trust between the two states, the geographical location of the region, and other issues.

Conclusion. For many years, the head of state, Ilham Aliyev, used diplomatic and political means to restore the territorial integrity of the Republic of Azerbaijan. These efforts, in fact, created a legal basis for a fair resolution of the conflict. The resolutions adopted by international organizations, the statements made, and the bringing of the history and facts of the conflict to the attention of the countries of the world resulted in its complete resolution after about thirty years. The Second Karabakh War, which began on September 27, 2020 and ended with the Trilateral Declaration signed by the President of the Republic of Azerbaijan, the President of the Russian Federation, and the Prime Minister of the Republic of Armenia on November 10, can be assessed as the second period of escalation and the decisive stage of the conflict. This historic victory is undoubtedly a manifestation of correctly conducted army building and military policy.

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DOI https://doi.org/10.30525/2592-8813-2026-2-41

PUBLIC AND POLITICAL LIFE OF THE JEWISH COMMUNITY IN THE TERRITORIES OF THE NORTHERN DISTRICT OF KHERSON PROVINCE IN THE SECOND HALF OF THE 19TH – BEGINNING OF THE 20TH CENTURY

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Abstract. The article examines the socio-political life of the Jewish community in the northern counties of the Kherson province (in particular, the Yelysavetgrad region) at the end of the 19th and beginning of the 20th centuries. Based on archival materials from the Central State Historical Archive of Ukraine and the State Archive of the Kirovograd region, the functioning of public self-government institutions (kagal), the development of charitable organizations, and the participation of Jews in the revolutionary movement are analyzed.

Particular attention is paid to the activities of the Yelysavetgrad Committee for Assistance to Victims of the Pogroms of 1881–1882, as well as the political involvement of representatives of the Jewish community of county cities in all-Russian parties and organizations (RSDRP, SRs, anarchists, Bund, Poalei-Zion). The attitude of the tsarist authorities to the Jewish question, Black Hundreds organizations, and all-Russian political forces is highlighted. The conclusion is made about the high level of self-organization of the Jewish community and its active role in the socio-political processes of the region.

Key words: Jewish community, Poale Zion, "Bund", Talmud-Torah, social democrats, anarchists, pogroms.

Introduction. In the second half of the 19th century, the Jewish community faced many forms of oppression in the Russian Empire. Among the negative factors influencing the life of the Jewish community, one should mention the “settlement strip” of Jews, the infamous pogroms. Since Elisavetgrad had been part of the Yekaterinoslav Governorate since 1795, it was automatically included in the border of Jewish settlement. As a result, the number of Jewish population in the city grew significantly. The description of Elisavetgrad, made by the magistrate during the General Delimitation of the city in 1796, states the exact number of Jews living in the settlement: merchants – 3 men and 2 women, townspeople – 177 men and 241 women (DAKirO, F.833, Descr. 2, File 869, sheet 5).

Main text. In Elisavetgrad, the Jews created their own bodies of city self-government. Thus, by 1842, there was a Jewish kahal in the city, which performed spiritual, general educational and administrative functions. The kahal carried out self-imposition of taxes on Jews for public needs and managed public funds. Such powers became the basis for abuses, and they fell as a significant burden on the shoulders of the poorest sections of the Jewish population, since the leading positions in the kahal were held by representatives of the elite. The kahals were officially liquidated in 1844 and the Jews became subordinate to the city administration and police of Elisavetgrad. However, de facto, the Qahals continued to exist, since Jewish recruitment stations were still maintained, and the Jews themselves remained taxpayers (DAKirO, F.833, Descr. 2, file 869, sheet 9).

Due to the significant percentage of Jewish residents among the townspeople (by the middle of the 19th century, almost every third resident of Yelysavetgrad was of Jewish nationality), in cases of self-organization in the face of natural disasters and epidemics, both city-wide and purely Jewish committees for combating disasters were formed (DAKirO, F.833, Descr. 2, File 869, sheet 10).

Jewish charity began to develop around the 1860s, it was during this period that the wealthiest representatives of the national minority began to donate their fortunes and make wills in favor of

the city administration. The money was deposited in a perpetual contribution to the State Bank, so that the interest on it would be given to Jewish schools, the public Talmud-Torah and to the poorest townspeople of the Jewish faith or to the Jewish almshouse. In the 1880s, a new Jewish almshouse with an attached hospital was opened in Yelysavetgrad. Among the most developed Jewish charitable societies of the early 20th century, it is worth noting the "Society for Helping Poor Jews", which established a dining room where free meals were provided and loans were issued on the most favorable terms of that time. At the same time, a free Jewish library was opened in the city, the budget of which was made up of voluntary contributions and donations. In 1912, the library's book collection amounted to almost 2,386 accounting units. books, there were 254 subscribers, books were delivered to homes free of charge (DAKirO, F.833, Descr. 2, File 869, sheets 20–21).

One of the most prominent representatives of the public and political movement in Yelysavetgrad from among the Jewish population was Isaak Vulfovich Shklovsky, an employee of Odessa newspapers, who distinguished himself with numerous feuilletons, scientific reviews and theatrical notes. After returning from Odessa to his hometown of Yelysavetgrad, he immediately came under police investigation in the case of the Yelysavetgrad People's Volunteer Circle. The case ended with I.V. Shklovsky in 1886 being sentenced to exile to Eastern Siberia under police supervision for 5 years. While serving his sentence, I.V. Shklovsky, according to the penal authorities, "resisted the prison administration, the military guard and the police", for which he was additionally subjected to repressions (DAKirO, F.833, Descr. 2, File 869, sheet 21).

One of the most tragic pages of the Jewish people in the territory of Ukrainian lands are pogroms. Misunderstandings between representatives of different ethnic groups and the desire for easy profit during the robbery of national minorities became the basis for such bloody events, which also took place in the Yelysavetgrad district. For example, on the night of April 15 (27) to 16 (28) of 1881, a pogrom occurred in Yelysavetgrad during the Orthodox Easter week. As a result, the Yelysavetgrad city authorities sent 30 foot soldiers and 12 horsemen and a squadron of the Belarusian hussar regiment to the city police to maintain public order. These events prompted the Jewish population to escape the threat of physical violence by fleeing the city. According to the data of the Yelysavetgrad city council, 105 people left Yelysavetgrad from April to September 1881. Later, pogroms occurred in three more cities, two towns, at the railway station and 40 rural settlements of the Kherson province. They spread to the Ekaterinoslav province (DAKirO). F. 78. Descr. 13. File 8. Sheet 6–6-reverse, 77).

At the same time, the Jewish community also demonstrated other, more organized activities to overcome the consequences of the pogroms, in addition to fleeing from dangerous regions. For example, there was the Yelysavetgrad Committee for Aid to Jews Affected by the Pogroms of 1881–1882. This organization was founded by citizens of the city, whose names could not be fully established: doctors Tsetkin, Zagorsky and Rosenstein, associate attorneys Pokrasov and Berenstein, merchants Solomon, Semen and Abram Reiser (father and two sons), Tarnopolsky, Lev Levovich Shklovsky, Saveliy Osipovich Ginzburg, Gorfinkel, Grigory Leontiyovich and Alexander Leontiyovich Kogan, merchants Slobodsky and Zolotarev, Jonah Tyomkin (father of Zinovy Tyomkin, later a famous public and political figure, first as a social democrat, and then on the side of revisionist Zionism). The city authorities approved of the creation of the committee, and the mayor, Alexander Pashutin, immediately turned to the governor of Erdeli with a request to authorize the creation of the committee and its activities under the direct leadership of the city council, which was done (Yashin, 2009, pp. 29–30).

The committee’s work consisted of providing diverse assistance to the victims. For example, in May 1881, the committee was transferred by rail from the capital’s co-religionists four poods of old clothing collected for the benefit of the Jews of Yelysavetgrad, which was later repeated. Part of the funds collected by the committee were used to pay for the travel of Jews from Yelysavetgrad to other cities, in particular within the province: to Olviopol, Oleksandria, Novoukrainka, Znamenka, and others. As emergency assistance in the first post-pogrom days, the victims were provided with

food supplies of flour and baked bread. When the committee more accurately established the number of victims, targeted cash payments began (Yashin, 2009, pp. 31–32).

The committee members themselves showed a special approach to aid. Thus, G. Kogan (the committee's treasurer and a merchant by profession) purchased flour at discounts to help the victims. Doctors Zetkin, Zagorsky and Rosenstein provided free medicine for the victims "at the expense of the committee" (Yashin, 2009, p. 33).

Contacts were established with Jewish charitable organizations in other cities, which responded to the call for help. Thus, in May 1881, the Ladies' Committee of the Jewish Orphanage in St. Petersburg sent another aid, consisting of "five bales of old and new things: clothes and linen." Thanks to the measures, it was possible to avoid hunger and diseases among the victims, who found themselves in a difficult situation (robbered, without means of subsistence and without guarantees of daily food) (Yashyn, 2009, p. 31).

An example of politically motivated violence against the Jews of Yelysavetgrad can be traced in the activities of the Black Hundreds party "Union of the Russian People". As is known, it was characterized by ultra-right terror, which aimed to intimidate not only opposition figures against the Russian autocracy, but also the population in general (DAKirO. DIF. Newspaper "Nash Put". March 13, 1907, No. 1. Inv. No. 2047. Sheet 4.). The participants themselves admitted to their chauvinistic views regarding all peoples living in the territories of the then Russian Empire, where Jews were particularly criticized (DAKirO. DIF. Newspaper "Union". February 24, 1907, No. 8. Inv. No. 1960. Sheet 2–3.). The factor of oppression of Jews by the local population and the authorities was one of the reasons for their more active involvement in the political life of society and the radicalization of some of its representatives, who found their niche among the left radicals (Bolsheviks, Socialist-Revolutionaries, anarchists, and others).

In their publication "Union", representatives of this Black Hundreds party actively criticized their opponents from the moderate centrists, democratic students, left-wing figures, and representatives of Jewish nationality. Often these attacks were combined and quite clearly showed in the rhetoric those accents that were shared by the participants of the organization. Thus, according to their report on the strike on February 21, 1907 at the Yelysavetgrad Real School, the organizer was a Jewish student who, as the Black Hundreds stated, received a sympathetic response from his Russian classmates, to their shame. In their appeals, the "allies" actively appealed to the authority of God (in the context of protecting the conservative ideals of society), criticized liberal newspapers (as the main opponents in the struggle for influence on the younger generation) and, in conclusion, called for defending the dominance of the Russian people in the multinational empire against the so-called invasion by foreigners, although the question of who is the invader is largely distorted by the Black Hundreds (DAKirO, DIF, newspaper "Soyuz" 24.02.1907, No. 8, inv. No. 1960, Sheet 2–3).

The gendarmerie also had a distrustful and rather meticulous attitude towards Jews. For example, in the report of the non-commissioned officer of the additional staff of the Kherson provincial gendarmerie department in the Yelysavetgrad district dated August 26, 1906, No. 58, the issues of revolutionary agitation by the left among the population were considered. Namely, leaflets of a social-democratic orientation were found on the part of the employee of the Golfeld dairy farm. It is also noted in the case materials that the employee Tkachenko (accused of agitation) not only gathered around him a crowd of soldiers of the garrison for anti-government conversations, but also people of Jewish nationality (such attention of the gendarme looks rather tendentious). Quite important is the distrustful attitude towards Golfeld himself (the owner of the dairy farm), whom the gendarmes also call politically unreliable (TsDIAK F.353. Descr. 1. File 1. Sheets 1–1 reverse).

At the same time, this case also mentions a search not only in the room of the arrested Tkachenko, but also in Golfeld's apartment as a whole. No provocative materials were found in anyone except Tkachenko (TsDIAK F.353. Descr. 1. File 1, sheets 4–5 reverse).

Also, according to the materials of the fund of the assistant chief of the Kherson gendarmerie department in Yelysavetgrad district, you can see a list and information about the most famous political figures who were under surveillance at the time of 1908. Thus, among the 9 unreliable individuals on the list, one can single out the anarchist Shlyoma Mykovich of Zhytomyr (he lived in the city of Yelysavetgrad, a burgher, without a specific occupation), who was a representative of the Jewish community and joined the libertarian left movements (TsDIAK F.353. Descr. 1. File 2, Sheets 3–40). Regarding the history of Jews in the anarchist movement, one cannot ignore such a figure as Judah Grossman. He was born in 1883 in the town of Novoukrainka, Yelysavetgrad district, into a wealthy Jewish merchant family. Like many of his comrades in the anarchist movement, he began his public and political career in social democratic circles. In 1897, he joined the "South Russian Workers' Union" in Yelysavetgrad, created and led by his older brother Abram. But the following year, he was arrested together with his brother. From 1899, Judah lived in Novoukrainka and was under police supervision. In 1902, he emigrated to Europe, where his views changed radically. He finally moved away from social democracy and in 1903 switched to the anarchist platform, which was then led in London by Peter Kropotkin, one of the most influential figures of the left-libertarian movement. Yu. Grossman was a brilliant orator, "arguing with the Bundists and Socialist Revolutionaries. No one could defeat him in a debate." He included in the organization of his federation anarchists known in the Ukrainian provinces K. Erdelevsky, O. Taratuta and others, which gave him the opportunity to organize groups of the “Black Flag” in many cities of Ukraine: Odessa, Mykolaiv, Yelysavetgrad, Lutsk, Kamianets-Podilskyi, Rivne, Zhytomyr, Berdychiv, Kyiv, Katerynoslav, Kamiansk, Nikopol, Simferopol, Sevastopol, Novozybkov (Savchenko, 2017, pp. 14–15).

As a result of the political assassination of Alexander II by members of the revolutionary organization "Narodna Volya", a significant part of the population turned its attention to the Jewish minority as the main culprit due to the established stereotype and partial representation of Jews among the revolutionaries. Kherson province as a whole and Yelysavetgrad in particular were no exception to this rule. Since the 1870s, another factor in the socio-political life of society has been added to the already existing manifestations of anti-Semitism on the part of state policy - the active involvement of Jewish youth in various parties and organizations. As an example, in 1905, another Jewish pogrom occurred in the city. This time, even a public safety committee was created in response to anti-Semitic violence. At the same time, a connection was observed between revolutionary events and Jewish pogroms. The socio-economic dissatisfaction of the most vulnerable segments of the population was sometimes skillfully channeled into anti-Semitic speeches (DAKirO, F.833. Descr. 2. File 869. Sheets 15–16).

Regarding the political involvement of Jews and the attitude towards them by various parties, it is also worth mentioning the position of the All-Russian Social Democracy. In the leaflets of the Yelysavetgrad Committee of the RSDLP, one could see frequent mention not only of the factor of the Jewish population in the life of the entire society of the region, but also voiced specific demands of representatives of their people.

For example, in 1899, according to a leaflet prepared by the Yelysavetgrad branch of the RSDLP, there was dissatisfaction with working conditions among printing workers in the city. Among the most frequent complaints are: saving on lamps in the premises (as a result, workers' eyesight quickly deteriorated), low wages during a long working day, a policy of fines for being late for such "work", forced overtime and unpaid shifts, lack of medical insurance, lack of high-quality ventilation of work premises, etc. Special attention is paid to the requirements for working hours, in particular, before all annual holidays it was required to stop work half a day before the holiday, among which the "Jewish New Year" is mentioned. There was also a requirement to finish work at 4 o'clock on Friday for Jewish workers (for other nationalities - on Saturday with an afternoon break of one hour) due to the special role of the Sabbath in their religion. This moment is a rather important marker for the direction of national policy in the Social Democrats (TsDIAK, F. 838. Descr. 1. File 1178. Sheets 1–3).

In a leaflet (issued in 3,000 copies) dated July 3, 1905, the Yelysavetgrad branch of the RSDLP addressed its negative attitude to the "criminal act" of the workers of the Elvorti factory. This accusation arose on the basis that during protests and strikes they submitted a loyal petition to the emperor regarding "restrictions on the rights of Jewish workers". The specific text of this petition is not given in the leaflet. The text of the leaflet quite seriously criticizes the policy of inciting one nationality against another and anti-Semitism in particular. At the same time, a kind of appeal is made to the workers of the Elvorti factory "to honestly and seriously discuss their act" in order to reveal that they had become victims of "the scoundrels of the Bobrovnitsky priests, the sworn attorneys of the Ivanovs and other enemies of the people", who aim to strengthen the positions of the autocracy. According to the author of the leaflet, such a policy leads only to fratricide (in the social sense), when the titular nations will be hostile not only to Jews, but also to Armenians, the intelligentsia, and the Social Democrats in particular (TsDIAK, F.838. Descr. 1. File 1182. Sheet 1).

The Socialist-Revolutionaries of Yelysavetgrad also paid attention to Jews in their propaganda materials. Thus, in November 1906, they published one of the leaflets entitled "Why have goods become more expensive?", in which, atypically for left-wing radical forces, they justified Jewish merchants in raising the prices of goods. In most other leaflets of the Socialist-Revolutionaries, which do not concern the display of their individual terror and "executions" of various tyrants, the economic and social issue is described quite generally and without sufficient specificity in certain areas of life (the issue of the property system, which was simply unjust from their point of view, and the approach to its management by privileged categories of the population was most often raised). They made the capitalists, landowners, Black Hundreds and the tsarist government the main culprits. They were separately accused of Jewish pogroms and inciting the majority of the population against other nationalities (TsDIAK, F.838. Descr. 2. File 579. Sheet 1).

In Yelysavetgrad there were also supporters of Zionist ideas and Bundists. For example, during the elections to the Yelysavetgrad Council of Workers' and Peasants' Deputies in the fall of 1917, the following voting pattern emerged.

Table 1

Voting results in the Yelysavetgrad Council of Workers' and Peasants' Deputies at the end of 1917

№	Party name	Voices of civilians	Voices of military personnel
1	Clergy	305	17
2	"Union of the Russian People"	127	20
3	German Nationalists	85	16
4	Socialist Revolutionaries	1013	2097
5	Cadets	3719	417
6	Poalei-Zion	94	3
7	Social Democrats (United)	1279	74
8	Ukrainian Social Democrats	3640	1000
9	Bolsheviks	1740	1440
10	Bund	7289	88
11	Co-operators	180	26
12	Growers	77	5

Despite being the second most popular political party among the residents of Yelysavetgrad, the Jewish bloc of left-wing parties (united around the Bundists) did not become a complete monopolist of attention from the Jewish community. Thus, a number of its representatives joined the socio-political movement as part of other groups, especially all-Russian parties. For example, among the members

of the Yelysavetgrad organization of the Russian Social Democratic Labor Party were K. Dergold, A. Broylan, D. Lekhman and others (DAKirO, F.833. Descr. 2. File 869. Sheet 25).

Conclusions. Thus, the socio-political life of the Jewish community of the northern counties of the Kherson province in the late 19th and early 20th centuries developed in conditions of a combination of imperial restrictions on the part of the authorities (settlement zone, discriminatory legislation, pogroms) and a high level of internal self-organization. The Jewish community of the Yelysavetgrad region, despite the official abolition of the kagal, preserved the mechanisms of self-government and created an extensive system of charitable institutions (the Society for Aid to Poor Jews, a free library, an almshouse with a hospital), which provided social protection for the poorest strata. At the same time, representatives of Jewish youth actively joined revolutionary movements - from the "Narodnaya Volya" (I. Shklovsky) to the anarchists (Yu. Grossman), and also supported national parties (Bund, Poalei-Zion). The pogroms of 1881 became a catalyst for both emigration and the creation of effective self-help mechanisms (the Yelysavetgrad Committee for Aid to Victims of Jewish War). An important role was also played by the all-Russian left parties, which in their agitation consistently opposed anti-Semitism and included demands for taking into account the religious characteristics of Jewish workers. Thus, the Jewish community of the region appears not as a passive object of state policy, but as an active subject of socio-political processes, capable of self-organization, solidarity, and various forms of political participation.

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DOI https://doi.org/10.30525/2592-8813-2026-2-42

ARCHAEOLOGICAL EXCAVATIONS AT THE RED CHURCH KHOJAVEND DISTRICT

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Abstract. Initial archaeological excavations and field exploration works were carried out within a 10 m² area of the Red Church (Gırmızı Kilsə/Garnir), a historical architectural monument located in the village of Bine (Domu-Temirli) in the Khojavend district of Karabakh. The monument was constructed in the form of a basilica with a vaulted hall and reflects construction techniques characteristic of the ancient period. The main entrance leading to the temple is situated on the western side of the monument. The church is 11 meters long and 6.45 meters wide, with a total area of 225 m².

Some of these temples were built on the foundations of earlier pagan sanctuaries, while others were reconstructed and adapted in accordance with Christian religious traditions. The relocation of the capital of Caucasian Albania to the city of Barda in 552 contributed to the increase in settlements and Christian Albanian monuments in Karabakh during the Early Middle Ages.

The preliminary results of the archaeological excavations provide grounds to suggest that the Red Church monument was constructed in the 10th century on the remains of an earlier structure. The Red Church architectural monument belongs to the simple-type, single-nave temple category with a vaulted ceiling and dates to the final stage of the Early Middle Ages. During field exploration works, it was also determined that another structure known as the “Small Temple” (Kiçik Məbəd), as well as the remains of a bridge and a caravanserai, are located near the Red Church, indicating that a medieval trade caravan route once passed through this area.

Key words: Karabakh, Albanian temple, archaeological excavation, building remains, cultural layer.

Introduction. The territory covered by the Karabakh Economic Region of Azerbaijan is rich in historical and archaeological monuments belonging to various periods and types. Such diversity is primarily connected with the favorable natural-geographical conditions of the region and the abundance of raw material resources. The transfer of the capital of Caucasian Albania to the city of Barda in 552 resulted in an increase both in settlements and in Christian Albanian monuments in Karabakh during the Early Middle Ages (Mammadov, 2000).

Some of these temples were built on the sites of earlier pagan sanctuaries, while others were reconstructed and adapted to Christian religious norms (Khalilov, 2011). Another group of monuments was constructed within dense forests and rocky areas in order to protect the population from persecution. Research demonstrates that the foothills of the Lesser Caucasus Mountains are rich in architectural and funerary monuments related to Christianity dating from the 5th to the 18th centuries. Since many of these Christian monuments have not yet been comprehensively studied, they were commonly referred to among the local population as "Armenian cemeteries" or "Armenian churches" (Mammadov, 2003).

In this regard, the Red Church monument, located on a high hill to the northeast of the village of Bine (Domu) in the Khojavend district, attracts particular attention. During the initial stage of the research, the geographical coordinates of the monument were identified as GPS 39°34'56.29"N, 46°54'2.76"E.

Figure 1. Khojavend, Binə village. General view of the Red Church Albanian monument (Mammadov A.M.)

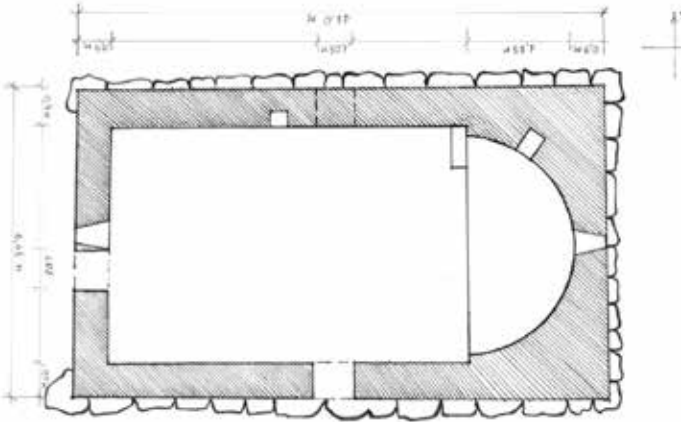

Figure 2. Khojavend, Binə village. Plan of the Red Church Albanian monument (artist: Gasimli K.B.)

Although the Red Church monument has previously been studied from an architectural perspective and some information about it has been provided in scholarly works based on written sources, it was archaeologically investigated for the first time in the autumn of 2025 under the leadership of Professor Arif Mammadov. The Red Church monument is situated at an altitude of 1,750 meters above sea level on the summit of a mountain surrounded on three sides by deep gorges. Considering that the sun rises in the east and sets in the west, the sanctuary (apse) of the Red Church was constructed on the eastern side in accordance with pagan temple traditions, while the main entrance gate was placed on the western side. From this, it can be concluded that during the construction of the Red Church monument with its simple architectural design, the rugged relief of the high mountainous area and construction expenses were also taken into consideration.

The monument was built in accordance with the construction techniques of the antique period in the form of a basilica and a vaulted hall. The main road leading to the temple approaches the monument from the western side. The church is 11 meters long and 6.45 meters wide, with a total area of 225 m². The surrounding territory of the monument covers nearly two hectares. It has been noted that in early medieval cities, three-naved churches were common, whereas in villages, single-naved small-sized temples were mainly characteristic of Christian monuments of the Near East (Khalilov, 2011). This view may also be applied to the Red Church monument. The temples of Kish (Sheki), Calut (Oghuz), Govurgala (Aghdam), Chaykend (Goygol), Gozlu (Kalbajar), Balligaya (Aghdara), Ayrivang (Gadabay), Torpaggala (Tovuz), Avey (Gazakh), Meshali (Goranboy), Mazimgaray (Balakan), Bideyis (Sheki), Bash Kungut (Sheki), Bash Goynuk (Sovma-Sheki), Tatef (Western Azerbaijan – Western Zangezur, Goris), and the Mingachevir temples numbered 1, 2, 3, and 4 are also considered single-naved rectangular Christian religious monuments.

Discussion. The construction of a semicircular apse in the Red Church monument, which belongs to the simple type of religious buildings consisting of a single-naved vaulted hall, distinguishes it from other rectangular-plan structures of its period. The second entrance of the temple was located on the southern side, while the doorway facing north was sealed during restoration works. Although it has been reported that a construction inscription once existed above the doorway in the western wall, no such inscription has been found today. Archaeological investigations revealed that although the roof, the southeastern wall, and the northwestern wall of the temple were destroyed, the eastern wall has survived intact. Gulchohra Mammadova and Mubariz Khalilov, based on written sources, and Arif Mammadov, based on archaeological research, state that the temple was built at the end of the 10th century AD.

The written inscription presented in the text states: “During the reign of Hagik, son of Musa, I, Voski (I. Sofi), daughter of Musa, built this House of God for the salvation of my soul and the souls of my parents.” In the works of Armenian “researchers,” this monument has been referred to as the Qarmir Church, and it has been stated that the eastern wall of the monument has survived. Based on the inscription on the facing of the western window, they claimed that the monument was built by I. Sofi, daughter of Musa, in the summer of the year 449 according to the Armenian calendar.

However, since no Albanian ruler named Hagik is known from historical sources, the above-mentioned claims remain hypothetical in nature. It may therefore be assumed that Hagik and his father Musa ruled the Albanian state after Ishkhanid, the grandson of the Albanian ruler Gregory Hamam. Musa and his son Hagik were probably provincial governors within the Albanian state, which survived until 1008.

Depending on the height of the altar apse in Christian temples, it is possible to determine the denomination to which the church belonged. Altars located 25–40 cm above the floor level of the hall are considered characteristic of Dyophysite churches, where the priest remained closer to the worshippers. In Monophysite churches, however, since the divine and human natures of Christ were regarded as united, the altar was constructed at a higher elevation so that the priest, representing

Christ, would stand above the congregation. The transition to Dyophysite churches during restoration works is associated with the political events of the 6th–8th centuries (Khalilov, 2011).

In 705, the Albanian state temporarily collapsed, and Albanian Christianity lost its status as the state religion. After the weakening of Arab rule, the Albanian Kingdom was partially restored in the mountainous regions of Karabakh in the 9th century. The Principality of Khachin rose to prominence in the regions of Arsakh and Utik (Mammadov, 2022). Following the restoration of the Albanian state by Gregory Hamam, Christianity once again became the state religion between 885 and 1008. This principality flourished further during the reign of Hasan Jalal (1215–1261), who was referred to as the "King of Albania" and the "Lord of the Albanian provinces." This period represented a revival of Albanian culture and statehood. Although the Albanian state experienced temporary decline during certain periods, Albanian culture was preserved until 1836 (Khalilov, 2011).

The construction period of the Red Church monument also corresponds to the reign of Gregory Hamam. Current archaeological investigations conducted at the Red Church suggest that the foundation of the temple was laid at the end of the 10th century, and that its original plan was close to a rectangular form. During restoration works in the 12th–13th centuries, the dome section of the temple was constructed, giving the monument its final architectural form. The blocking of the northern doorway of the church further confirms that restoration activities were carried out there (Mammadov, Yusifova, Mammadzadeh, & Gasimli, 2025).

As in the earliest Christian temples, the Red Church monument possesses only a small number of narrow windows (two surviving examples), which create a dim lighting effect inside the hall. Through this method, an impression of "divine darkness" was created within the temples. Worshippers, isolated from the outside environment, were symbolically transferred into a mystical and mysterious world, thereby strengthening the spiritual influence of Christianity.

The total dimensions of the rectangular prayer hall of the church are 9.3 m in length and 4.5 m in width. The semicircular altar apse of the temple is incorporated within the rectangular structure. Its dimensions, in terms of the ratio of length to width, are 1.85 × 3.70 m. Although large river and rock stones were mainly used in the construction of the temple, its upper section (the rotunda) was covered with baked bricks measuring 27 × 27 × 5 cm, which represents a construction technique characteristic of Christian religious architecture during the late stage of the early medieval period. Lime mortar was used as the binding material in the construction of the temple.

Although the southwestern walls of the temple collapsed, the northeastern wall has survived to a height of 2–3 meters. The thickness of the wall is 90 cm. Both the southern entrance and the western doorway, which is considered the main entrance, are 1.05 m wide. The window is located on the eastern wall of the altar apse. The loophole-shaped window opening measures 90 cm in height and 47 cm in width. There is also a loophole-shaped window on the eastern wall of the altar and niches in the northern wall. At a height of 1.1 m from the dismantled floor of the altar, there is a niche in the northern wall measuring 50 cm in width and 40 cm in height. Beside it, another niche, which was sealed during restoration works, measures 40 × 40 cm. The edges of the second niche are bordered on both sides with cut stone blocks placed vertically. Both niches were mainly used for lighting candles and placing votive offerings. The cut stones framing the restored niche are completed with a slab covering.

A semicircular apse is located in the area where the cross stone leans against the eastern wall of the monument. The height of the cross stone is 1.20 m, its width at the bottom is 67 cm, and at the upper part it measures 78 cm. Small cross motifs, later engraved by carving technique, are clearly visible on the lower section of the cross stone (Mammadov, Yusifova, Mammadzadeh, & Gasimli, 2025).

According to researchers, the cross became a Christian religious symbol from the 4th century onward (Museyibov, 1992). In 326, Christianity was proclaimed the state religion in Caucasian Albania (Khalilov, 2011).

The earliest examples of cross stones appeared in the 9th century and gradually replaced memorial pillars. The “interlaced ribbon” ornament, widely распространённый in Christian monuments, began to be engraved on cross stones in the 10th century (Khalilov, 2011), which corresponds to the depictions found on the cross stone of the Red Church monument. The oldest examples of Albanian crosses in Azerbaijan were discovered during the excavations at Mingachevir. Most of the Mingachevir crosses are characterized by rounded knobs at the ends of their arms. Although this form of cross continued for several centuries, during the medieval period the rounded knobs gradually acquired a leaf-like shape. Straight crosses without protrusions on their arms were also discovered during the Mingachevir excavations, and similar examples have been identified in other regions of the South Caucasus (Vahidov, 1961).

The earliest knobbed crosses are dated to the 5th–6th centuries. Such crosses are known from the basilicas, the Gagik Temple, and the Church of the Holy Apostles located in the territories of historical Albania, particularly in Western Azerbaijan (present-day Armenia)

In the southwestern part of the church’s prayer hall, there is a Christian grave bearing the date of death 1878. It appears that this tombstone was placed there at a later period. The fact that the oldest Christian graves recorded around the temple date only from the mid-19th century onward suggests that Christian populations relocated from Iran and Türkiye were settled in the area and that they had no direct historical connection with this temple. According to our preliminary investigations, this rectangular and elongated structure, oriented along the east–west axis, terminates in the east with a semicircular apse. From the northeastern side, the temple consists of an elongated rectangular hall covered with a semi-cylindrical dome. The roof covering is dome-shaped, while the inner walls were plastered with white lime mortar. The square-shaped prayer hall is completed in the northeastern part by a semicircular altar apse. The interior and exterior of the structure, whose prayer hall measures 6.3 m in length and 4.5 m in width, possess a rectangular architectural form (Mammadov, Yusifova, Mammadzadeh, & Gasimli, 2025).

Our preliminary research demonstrates that the Red Church architectural monument belongs to the group of single-naved, vaulted Christian temples representing the simplest type of early medieval Christian religious architecture and that it originally consisted of a rectangular construction. Archaeological excavations uncovered roof tile fragments that once ensured water drainage from the upper part of the church, numerous unglazed ceramic artifacts, a limited number of glazed pottery samples, part of a cutting tool, small quantities of glass fragments, and osteological remains. Similar materials are known from archaeological investigations conducted in the territory of Kalbajar District, particularly in the village of Keshdak (Mammadov, Allahverdiyeva, & Abbasova, 2006).

The material culture remains discovered during archaeological excavations, mainly dating from the 10th to the 19th centuries, together with the dimensions of the baked bricks used in construction, correspond with the information found in written sources and confirm that the presently visible section of the monument was built in the 10th century. It should be noted that although the collapse of the Albanian state under Arab conquest and the subordination of Albanian Christian churches to the Armenian Gregorian Church restricted the activities of the Albanian Church, they did not entirely stop them. During this period, important church centers such as Gandzasar Monastery, Khudavang Monastery, Berdakur, St. Yelisey, and Mahrasa were constructed (Mammadov, Allahverdiyeva, & Jafarov, 2007). The seat of the Albanian Catholicosate was located near Derbent in Chola during the 4th–5th centuries, in Barda during the 6th–7th centuries, in the Khudavang Monastery during the 8th–9th centuries, and in the Gandzasar Monastery during the 12th–19th centuries (Mammadov, 2005). Churches built after the Arab conquest were often constructed in order to avoid the jizya tax imposed on non-Muslim populations. However, considering that such temples were generally erected deep within forests and in inaccessible rocky areas where secret worship was conducted, the construction of the Red Church represents an exception.

In our opinion, before the construction of the Red Church, there had been a Zoroastrian place of worship in its vicinity, and a commercial caravan route passed through the area. This assumption is supported by the remains of bridges and buildings, as well as traces of narrow caravan roads observed and documented during field survey investigations around the church territory. Since the Red Church had not been used as a place of worship from the mid-19th century onward, additional burials were made inside the temple. One of these graves belonged to a woman buried in a supine position and discovered at a depth of 60 cm adjacent to the southern wall of the church. Inside the temple, to the north of a 19th-century grave located in the western section, two skeletons of young children buried side by side were uncovered in a cavity measuring 60 cm in length. These graves were found at a depth of approximately 1 meter. Another skeleton was recorded on the right side of these burials, adjacent to the northern wall of the church. Overall, excavations inside the church reached a depth of 1.60 meters.

Along the northern wall of the church, in the apse section, various objects believed to have been used for talismanic purposes were discovered at a depth of 20–30 cm near the wall line. During the research, it became clear that the local Albanian Christian inhabitants of the area regarded this monument as a sacred pilgrimage site and shrine. The presence of symbols resembling a "rooster's claw" and a "ram's horn" on the trunks and branches of the oak trees located northwest of the temple supports the idea that these features were associated with certain folk beliefs and ritual practices. There are also remains of ruined structures surrounding the Red Church. Survey investigations established that water had been supplied to both the church and the village through ceramic pipes extending from a nearby mountain source. Local inhabitants referred to these ruins as the "king's palace." Ottoman sources from 1727 indicate that the territory where the Red Church is located belonged to the Dizag district. It is possible that the remains described by the local population as ancient structures once constituted one of the estates of the rulers of Dizag.

Some distance away from these ancient ruins, on another lower hill surrounded by an old cemetery, there are the remains of another religious structure encircled by ancient graves. On the southern side of this religious building, an old grave without an inscription attracts attention. Local residents refer to this tombstone as the "king's grave."

In the valley between the palace and the village, there is a spring surrounded by the remains of ancient structures. The local population remembers it as the "King's Spring." These findings suggest that the monument was not constructed solely for memorial or religious purposes, but also served military-strategic functions while simultaneously controlling trade routes passing through the region. In the 10th century, the area formed part of the Shaddadid Dynasty state, and archaeological as well as historical studies indicate that the Shaddadids maintained similar observation points. During the rule of the Shaddadid dynasty, fortresses such as Gulustan Castle (Goranboy), Namard Gala (Gadabay), Gula (Gazakh), Carbend (Aghdara), and Maiden Castle (Jabrayil) were primarily used for defensive purposes, while churches such as the Band Temple (Goygol) and Beshikdash (Aghdam) functioned as observation points.

Compared with other sections of the monument, a greater concentration of scattered stone debris was recorded in the southeastern part of the temple. This suggests that these stones may have belonged to materials used during the period when the church was under Armenian control. After clearing the soil and stone debris, several ceramic vessel fragments and part of a cutting tool were uncovered. As excavations continued, a stone slab measuring 40 cm in length and 60 cm in width was identified in the central part of the apse. Numerous fragments of unglazed ceramic vessels were also recovered near the western section of the church (Mammadov, Yusifova, Mammadzadeh, & Gasimli, 2025).

Lime was used as the binding mortar in the construction of the temple, while river stones and rock stones were predominantly preferred in the masonry. Baked red bricks measuring 27 × 27 × 5 cm were used in the construction of the window opening and the dome section, and some of the gaps within the masonry were filled with rectangular and square-shaped stones. During excavations in the

central part of the temple's prayer hall, when the depth reached 60 cm, a neatly arranged stone pavement measuring 70 cm in length and 33 cm in width was uncovered. This stone pavement was found at the same level as the stone debris located in front of the masonry wall, which was probably part of the original structure. The recovered finds consisted of fragments of glazed and unglazed ceramic vessels, a small number of animal bone remains, glazed pottery mainly painted in light and dark brown monochrome colors, and a limited number of glazed vessels decorated with schematic motifs. The ceramic fragments represented body, rim, base, and handle sections of bowls and plate-type vessels (Mammadov, Yusifova, Mammadzadeh, & Gasimli, 2025).

The incense burners discovered in the Red Church are also of particular interest. A fragment on one ceramic artifact resembling a human skull is especially significant. This find is interpreted as representing a relic of a sacred body, which is characteristic of Christian religious traditions (Khalilov, 2011).

Approximately 500 meters northwest of the church, remains of another structure were documented by our research team. Around this monument, which we provisionally named the "Small Temple," fragments of surface pottery dating to the early medieval period were observed scattered across the area. The concentration of ceramic remains within a relatively limited territory suggests the possible existence of a small caravanserai-type stopping point there. It is likely that the structures presented locally as a "fortress" are in fact the remains of this caravanserai (Mammadov, Yusifova, Mammadzadeh, & Gasimli, 2025).

Near the village of Binə, there are numerous monuments dedicated to the brave prince and Dizag ruler Yesai Abu Musa and his successors. Although it is reported that the famous Goroz Fortress once stood on the western side of the trees currently regarded as a sacred pilgrimage site (pir), no visible traces of the fortress survive today. Some of the graves accidentally discovered in the territory of Binə village date back to the 1st–3rd centuries AD. The graves were arranged in two rows and covered with stone slabs measuring approximately 2.5 meters. Numerous clay vessels, beads made of bone and colored stones, decorated buttons, copper and bronze bracelets, rings made from goat horn, and shields bearing insect motifs were found within the graves.

In female burials, diadem ornaments made of coins, earrings, arm jewelry, and metal belts were discovered near the skulls of the skeletons. Close to the area where these graves were identified are located Goroz Fortress, Tahal Tower (9th century), the Royal Palace (10th century), the Khachkar monument in Qarmir Kar (Red Village) dating to the 13th century, and the Atautchay Bridge from the 18th century. Goroz Fortress is described as being situated in a landscape similar to the Ktich Mountains .

Conclusion. Based on the material culture remains and construction characteristics discovered within the excavated cultural layer of the Red Church (Qarmir) Albanian-period architectural monument, the currently visible structural remains may be dated to the 9th–10th centuries. The observation of deeper archaeological layers beneath the cultural strata inside the Red Church suggests that this temple was constructed on the remains of an earlier early medieval structure. Our preliminary investigations indicate that the Red Church architectural monument belonged to the group of single-naved, vaulted Christian religious buildings representing the simplest type of early medieval ecclesiastical architecture and that it originally possessed a rectangular construction plan.

Overall, it was determined during the excavation process that the wall remains uncovered beneath the destruction layers had been constructed mainly from river and rock stones. The identification of a caravanserai-type stopping point and bridge remains near the so-called "Small Temple," located approximately 500–600 meters northwest of the church, indicates that an important trade caravan route once passed through this territory. The discovered material culture remains suggest that the monument continued to be used until the first quarter of the 18th–19th centuries. It may therefore be concluded that following the abolition of the Albanian Catholicosate by the decision of the Holy

Synod of Saint Petersburg in 1836, the temple was destroyed by newly resettled Christian populations relocated from the territories of Iran and Türkiye under the terms of the Treaty of Turkmenchay (1828) and the Treaty of Adrianople. Subsequently, another church was constructed in the center of the newly established settlement of Binə village.

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DOI https://doi.org/10.30525/2592-8813-2026-2-43

HUMAN DEVELOPMENT MANAGEMENT IN THE AI ERA AS A TOOL FOR ACHIEVING SUSTAINABLE DEVELOPMENT IN THE REPUBLIC OF AZERBAIJAN

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Abstract. In this article we analyse human development management as an instrument for sustainable development policy of the Republic of Azerbaijan under the conditions of rapid digital AI development. We focus on three connected domains of education, digital infrastructure and cybersecurity, and post-conflict regional development and assess how public policy in each is responding to structural pressures of technological change (UNDP, 2025; OECD, 2023). Based on data from the Human Development Report 2025, ITU Global Cybersecurity Index 2024 and Global Peace Index 2025, the study places Azerbaijan in a comparative framework that includes post-Soviet states Russia, Kazakhstan, Georgia, Armenia and Uzbekistan and regional partners Türkiye and Iran (World Bank, 2024; ITU, 2024; IEP, 2025). This framework is the basis for Azerbaijan's genuine progress and structural constraints that continue to limit its development trajectory. The analysis is based on Academician Urkhan Alakbarov's (2019) concept of inclusive development management and on the prior work of the author on connecting human capital investment to sustainability outcomes (Mehdiyev, 2022) and the article asserts that Azerbaijan's further progress in the AI era depends on three interrelated conditions: stronger institutional coordination across policy sectors; the development of national AI governance mechanisms; and sustained long-term investment in human capital.

Key words: human development, sustainable development, Republic of Azerbaijan, artificial intelligence (AI), digital infrastructure, cybersecurity, institutional coordination, post-conflict development.

Introduction. The 2030 Agenda for Sustainable Development is in order to reframe people not as passive recipients of development outcomes but as active agents (United Nations, 2015). This conceptual shift draws upon Amartya Sen's capability approach to human development which is the substantive expansion of human freedom rather than the accumulation of material resources (Sen, 1999). The Human Development Report 2025 expands the concept of this framework to the form of artificial intelligence, and argues that AI is not just a technological instrument but a structural factor that shapes the conditions under which human capabilities are formed and exercised (UNDP, 2025).

For Azerbaijan, these theoretical positions have concrete empirical meaning as the country is moving through structural economic transition – diversifying away from hydrocarbon revenues, building digital public infrastructure and integrating previously affected territories into national development planning (IMF, 2023; World Bank, 2024); in this context, human capital quality is a central determinant of long-term resilience.

The article studies this problem from the perspective of human development management – the goal of which is to build up public policy in different sectors with the aim of human development in a sustainable and equitable manner. Its analysis is based on three empirical domains: education, digital infrastructure and cybersecurity; and post-conflict regional development. Azerbaijan has the position in each with respect to a comparative group of countries (Kazakhstan, Russia, Georgia and Armenia) and regional partners (Türkiye, Iran). This comparative framing is methodologically conscious: it makes it possible to identify structural patterns that are invisible in a purely national context.

Educational cooperation is a key part of this regional picture. Azerbaijan is now a more and more popular place for international students (modern.az, 2026; UNESCO, 2022), and such an impact not only contributes to the exchange of academic students but also to the regional integration processes that are directly related to human capital dynamics.

The theoretical foundation of the study is based on two complementary bodies of work. The first is Academician Urkhan Alakbarov's inclusive development management concept which is based on active institutional coordination as a pre-condition for sustainable and equitable growth (Alakbarov, 2017; 2019). The second is the author's previous work which indicates that human capital is an active driver of economic transformation only if it is embedded in stable institutional conditions with sustained public investment (Mehdiyev, 2022). Taken together, these frameworks support the study to migrate from broad theoretical discussion to an assessment of concrete policy conditions in the AI era.

Materials and Methods. The methodological framework combines four complementary approaches that enable a multidimensional study of human development in the context of AI diffusion. The first is a systems approach, which considers human development as a process that is shaped by the interrelation of economic, social, institutional and technological factors (UNDP, 2025; OECD, 2023; Alakbarov, 2017a). This perspective is especially relevant to the cross-sectoral nature of AI's effects, as a change in one domain – such as labour market disruption – will be reflected in feedback in education, digital access and institutional capacity in another. The study draws on national strategic document "Azerbaijan 2030: National Priorities for Socio-Economic Development and voluntary national reviews on the SDGs. The third is a comparative method that places Azerbaijan in a group of structurally close countries, post-Soviet states (Kazakhstan, Russia, Georgia, Armenia, Uzbekistan) and regional partners (Türkiye, Iran). The selection is based on shared historical legacies, geographic proximity, and overlapping development challenges (World Bank, 2024; UNESCO, 2022; ITU, 2024). The fourth is statistical analysis of key human development indicators: HDI, GNI per capita, educational achievement, broadband speed, internet penetration and cybersecurity score. Data is collected from World Bank, UNESCO, ITU, Ookla and Institute for Economics and Peace (World Bank, 2024; UNESCO, 2022; ITU, 2024; Ookla, 2025; IEP, 2025).

The analysis is based on descriptive statistics and contextual interpretation of institutional and policy differences. This combination allows for a more nuanced assessment than either quantitative ranking or qualitative narrative alone would allow for.

Theoretical Foundations of Human Development Management in the AI Era. Classical human capital theory, which was related to Gary Becker and Theodore Schultz, framed investment in education and health mainly based on their returns to the person and the nation's economic output. The World Bank and World Economic Forum, then, have developed this theory and have placed human capital as a strategic national asset and a competitive resource for the nation, where knowledge-intensive economies thrive (World Bank, 2024).

The Human Development Report 2025 is a further step into this idea. Instead of the accumulation of human capital, it focuses on the expansion of human capabilities – the substantive freedoms available to people to live lives they have reason to value (UNDP, 2025). In this framework, AI is not so much a technical tool as a structural force that can change the scope of human capabilities at scale. In contrast to previous generations of digital technology, AI systems are able to approximate some cognitive and creative functions, but not just automate physical or routine tasks (UNDP, 2025, Chapter 1; OECD, 2023).

This distinction is both a risk and an opportunity. As neuroscientist Terrence Sejnowski has said, large language models are not people, as their mode of processing is totally different from human cognition (UNDP, 2025, Spotlight 1.1). The risks are over-reliance on automated decision-making, amplification of already existing inequalities, and reproduction of algorithmic biases. The opportunities are enhanced productivity, expanded access to knowledge, and new forms of human-AI comple-

mentarity – but only where appropriate institutional and governance conditions exist (UNDP, 2025; OECD, 2023; European Commission, 2023).

In the national context, Academician Urkhan Alakbarov's inclusive development management view offers an analytically distinct framework. Its central argument is that the primary function of contemporary public administration is not routine service delivery but full development of state capacity and citizen well-being through proactive institutional design (Alakbarov, 2017b; 2019). Applied to Azerbaijan, Alakbarov shows that progress in these areas is dependent on innovative governance technologies, the digitalization of the public sector, and the development of a developmental state capable of steering long-term trajectories of inclusive growth.

Building on this foundation, the author's own research has shown that human capital has become a driver of economic transformation not automatically, but only when supported by systemic institutional conditions, stable investment frameworks, and coherent cross-sectoral policy (Mehdiyev, 2022).

These three theoretical layers – Sen's capability framework as the normative foundation, AI as the new structural context of development, and the Alakbarov approach as the nationally grounded analytical perspective – form the integrated framework of this study. They enable an assessment that moves beyond aggregate indicators toward the conditions that determine whether technological change expands or constrains human development in Azerbaijan.

Education as a Strategic Factor in the Era of New Technologies. The Human Development Report 2025 makes the case that is easy to agree with in principle but difficult to act on in practice: education systems must prioritize not access alone, but the quality of learning outcomes and the development of critical, creative, and interpersonal capabilities (UNDP, 2025). In the context of AI, this argument has a particular implication -- technology should be a complement to pedagogical depth, not replace it. Personalized learning platforms and digital educational resources can improve access and quality, but only where they reinforce and do not displace the core skill development (UNDP, 2025; UNESCO, 2022; OECD, 2023).

Table 1

Education indicators in comparative perspective

Country	Tertiary enrolment, gross % (UNESCO UIS, 2022–2023)	Public expenditure on education, % of GDP (World Bank, 2023)
Türkiye	127.6	4.3
Russia	n/a	4.7
Iran	67.2	3.9
Kazakhstan	60.7	4.1
Armenia	61.2	2.4
Georgia	78.9	3.8
Azerbaijan	41.0	3.7
Uzbekistan	45.8	5.1

Source: compiled by the author based on UNESCO UIS/TheGlobalEconomy.com (2022–2023)

Data are based on the most recent and available data for each country in the UNESCO comparative dataset (2022 or 2023). STEM share data are not consistently available across all countries in the comparison group and have been excluded to ensure methodological consistency. Azerbaijan's education system has undergone substantive reform, with increasing investment in the modernization of curricula, the development of digital infrastructure, and the growth of higher education capacity (UNESCO, 2022; Ministry of Science and Education, 2023).

Education is a core priority of the national development agenda and it was 3.7% of GDP in 2023 (World Bank, 2024) with higher education spending up to 4.5% of GDP. Currently, the tertiary enrolment rate is around 41% of the age group in Azerbaijan which is at the lower middle of the regional comparison group. Uzbekistan has witnessed a drastic rise in the tertiary enrolment rate over the last years (45.8% in 2023), indicating a further expansion of higher education in recent years and that Azerbaijan is now behind its Central Asian peers on this indicator (UNESCO UIS / TheGlobalEconomy.com, 2022-2023).

Türkiye's high gross enrolment ratio of over 127% reflects both the size of its higher education expansion and the large number of international students that it has attracted and is therefore not comparable on a like-for-like basis. The more important regional metric to measure the progress of Azerbaijan's development is the expansion of STEM and ICT oriented courses that are increasingly important for AI-based economic competitiveness. In this regard Azerbaijan's national priorities for Azerbaijan 2030 specifically include digital and technological education and this is an essential part of the strategy in order to achieve further progress (Azerbaijan 2030, 2021; UNDP, 2025).

Digital Infrastructure, Cybersecurity, and Security as Competitive Advantages. The education data presented above indicate that Azerbaijan still has some ground to cover when compared with other national leaders. But a more comprehensive picture of the country's development trajectory involves the areas of real and measurable benefits, which are directly related to how it absorbs and manages AI diffusion: digital infrastructure, cybersecurity and security stability in the countries of the world. These strengths are documented in established international sources and are not reflected as well by aggregate indices like the HDI.

As for digital connectivity, Azerbaijan has been the fastest-growing country in the region in fixed broadband speed. According to the Speedtest Global Index – the most widely used global rating of internet speed published monthly by Ookla – Azerbaijan's average fixed broadband speed was 84 Mbps in 2025, far above each country in the comparison group: Turkey (60 Mbps), Kazakhstan (82 Mbps), Armenia (72 Mbps), Georgia (43 Mbps) and Iran (19 Mbps) (Ookla, 2025). This is something new as Azerbaijan was ranked 116th on the list in 2016 and only 33 Mbps in 2016.

The turnaround is the result of ongoing investment in the online Azerbaijan program that reached full broadband coverage by end-2024 and made fibre-optic coverage available in rural areas and liberated territories in Karabakh as well (ITU, 2025). Internet penetration has reached 89% of the population – the highest in either the South Caucasus or Central Asia. As the ITU Regional Director (ITU, 2025) said in his report regarding Azerbaijan, the cost for a standard broadband subscription is only 1.3% of gross national income per capita, well below the 2% international standard.

Table 2

Fixed broadband internet speed in comparative perspective (Mbps, median, 2025)

Country	Fixed broadband speed (Mbps)	Internet penetration (%)
Azerbaijan	84	89
Kazakhstan	82	91
Armenia	72	79
Türkiye	60	85
Russia	82	88
Georgia	43	78
Uzbekistan	67	79
Iran	19	69

Source: compiled by the author based on Ookla / Speedtest Global Index (2025); ITU ICT Development Index (2025)

This is important for human development in a real-world sense. High-speed, affordable internet is the infrastructure through which AI-enabled services in education, healthcare, and public administration actually reach people. A country having built this infrastructure nationally – in the suburbs, not in the city – is better positioned to ensure that AI diffusion leads to inclusive development rather than further urban-rural divides (UNDP, 2025; ITU, 2025). Security is a second area of strength. For the ITU Global Cybersecurity Index 2024, which is the most rigorous global assessment of national cybersecurity frameworks, Azerbaijan ranked at the "Advanced" level with 93.76 out of 100, significantly above the global average of 65.7 (ITU, 2024). Azerbaijan achieved the highest score on two of the five assessment pillars (Legal Measures and International Cooperation).

This is particularly critical in the AI era: as decision-making at the sector level is now heavily dependent on digital systems, the integrity and resilience of those systems is the basis of responsible AI governance. A country that has a strong legal and collaborative approach to cybersecurity will be better positioned to extend protection to AI-specific risks (algorithmic manipulation, data breaches and adversarial attacks on digital public services) than one that has a weaker institutional base (ITU, 2024; OECD, 2023).

Table 3

Cybersecurity and peace indicators in comparative perspective

Country	GCI 2024, score / tier (ITU)	GPI 2025, rank / 163 (IEP)
Türkiye	100 / T1 Role-Modelling	146
Kazakhstan	94.04 / T2 Advancing	56
Azerbaijan	**93.76 / T2 Advancing**	**95 (↑18 positions)**
Armenia	T3 Establishing	58
Georgia	T3 Establishing	109
Uzbekistan	T3 Establishing	67
Russia	T2 Advancing	163 (last)
Iran	T3 Establishing	142

Source: compiled by the author based on ITU Global Cybersecurity Index 2024; IEP Global Peace Index 2025. GCI scores: exact figures available for Türkiye (100), Kazakhstan (94.04), and Azerbaijan (93.76); tier classification used for remaining countries. GPI ranks out of 163 countries assessed

The third dimension relates to physical security and stability, a basic component to human development that is often overlooked as it is only tangible when value is lost. The Global Peace Index 2025, conducted by the Institute for Economics and Peace and based on 23 indicators on societal safety, ongoing conflict and militarisation, showed Azerbaijan as the best performing country in all 163 nations, with an improvement from 113 to 95 (IEP, 2025).

The main reason was the decline of conflict-related deaths (both internal and external) that followed the end of active war in the Nagorno-Karabakh region. Russia was the lowest performer in the same index in comparison as well as Armenia and Georgia, but the majority of countries in the comparison group showed deterioration. A secure environment reduces the allocation of public wealth to military expenditure, enables investment plans to be made in the longer term, and allows the institutional continuity of human capital to develop over time (IEP, 2025; UNDP, 2025). Combined, these three indicators – regional broadband speed, advanced cybersecurity score, and world's largest improvement in peacefulness – demonstrate the structural conditions that make Azerbaijan a better place to support AI-enabled human development than its HDI ranking reflects. They do not solve the education gaps but it is clear that the country has established the foundation on which it can continue to progress (Alakbarov, 2019; Mehdiyev, 2022).

The development of AI is not linked to technology alone but the quality of the institutional systems that allow for AI to be deployed. The Human Development Report 2025 is very much about this: cooperation between multiple sectors is critical for AI to be beneficial for human development rather than hostile (UNDP, 2025). Alakbarov's inclusive development management framework provides a theoretical basis for this assertion: strategic planning, public administration reform and social policy must be consistent with long-term development goals if institutional efforts are to achieve coherent results (Alakbarov, 2017b; 2019).

There is international evidence to back up this view. Countries with a focus on specific coordination mechanisms – national digital councils, SDG implementation platforms and inter-ministerial working groups – have better growth and development outcomes (World Bank, 2024; OECD, 2023). Azerbaijan has made significant progress in this direction. As such, participation in SDG monitoring and the development of national strategic frameworks centered on human capital development, digitalization, and institutional reform are real policy commitments (UNDP, 2023; Azerbaijan 2030, 2021).

There are still many opportunities in institutional coordination. The sectoral boundaries between education, healthcare, labour market policy and digital development are not yet properly bridged, which makes policy responses to AI-related challenges difficult to coordinate. Making these connections stronger is especially crucial given the cross-sectoral impact of AI on human development.

Human Development Management and Regional Dimension. The involvement of human development as a focus for rehabilitation of the Karabakh region is a concrete demonstration of Azerbaijan's commitment to inclusive development. Not only is the rebuilding of schools, medical facilities, employment services and digital infrastructure in liberated territories a matter of physical reconstruction, but also the institutionalization of the development principles as outlined by Alakbarov and Mehdiyev and their impact on the policy formulation (Alakbarov 2019; Mehdiyev, 2022). Three key issues matter very much. Educational and medical institutions with digital and AI-enabled technology can accelerate human capital development in the region as long as physical infrastructure is coupled with sufficient human resources and quality of programming. Second, the restoration of communication and broadband access can close the digital divide and make distance learning and telemedicine viable from the ground up and are as much a function of connectivity (UNDP, 2025; ITU, 2023; 2025). Third, the involvement of local communities and returnees in planning and managing reconstruction projects builds institutional trust and long-term social resilience that external investment can't provide for (UNDP, 2023).

At the regional level, the rise in the education and science cooperation level of Azerbaijan (academic exchanges, joint research projects and cooperation with regional partners like Türkiye, Iran and post-Soviet countries) has created new pathways and links for sharing of global best practice and the development of common ethical norms for AI use in education and healthcare as well as social protection (UNDP, 2025; OECD, 2023).

The need to improve intersectoral coordination. As we have seen above, Azerbaijan is unable to respond to the development of AI in an efficient and equitable way due to lack of cohesive cross-sectoral mechanisms. Four areas of institutional development are particularly important. To the best of our knowledge, the establishment of a national coordination platform to link AI and the Sustainable Development Goals would help in developing policy coherence with a common institutional space that would enable government bodies, academia, the private sector, and civil society to work together on AI strategic planning and risk management (OECD, 2023; UNDP, 2021).

Moreover, developing better monitoring systems to include digital skills acquisition, AI usage, and access to technology would more accurately reflect development progress in the digital age, and not just HDI (UNDP, 2025; ITU, 2023). Third, it is essential to strengthen the link between strategic planning and public budgeting in order to make sure that investments in digital technologies are linked to long-term human development objectives rather than short-term efficiency gains (World Bank, 2024;

IMF, 2023). Lastly, stronger institutional cooperation between universities, research institutes, and the private sector would facilitate innovation and better align education and future human development in the AI-based economy (UNESCO, 2022; OECD, 2023).

Conclusion. This article has looked at human development management as a policy tool for sustainable development in Azerbaijan in light of the situation that AI has brought. The comparison of three domains (education, digital infrastructure and cybersecurity, and post-conflict regional development) is quite clear in this regard: Azerbaijan has achieved some of its best and exceptional results by regional standards but has to contend with structural restraints that AI diffusion is likely to expose and exacerbate. In education, the gap in tertiary enrolment compared to regional leaders (especially Türkiye and Kazakhstan) indicates that the human capital base for an AI-capable economy is not fully established.

In digital infrastructure and cybersecurity, Azerbaijan is in a more genuine position of leadership in the region: the country has the highest fixed broadband speed among its peers, an advanced status in the ITU Global Cybersecurity Index, and the world's greatest single-year improvement in the Global Peace Index in 2025. In post-conflict regional development, the rehabilitation of liberated territories is a major institutional challenge and a test of Azerbaijan's ability to apply inclusive development principles in practice.

The theory created by Alakbarov is very pertinent to the analysis of these patterns, with the same basic argument that human capital becomes a development accelerator if it is embedded in a stable institutional environment and if the investment is well-coordinated in a long-term way (Alakbarov, 2019).

The difficulty for Azerbaijan is not lack of strategic ambition but the institutional coherence necessary to translate that ambition into a consistent, fair, and sustainable development performance across sectors. AI's role in Azerbaijan's development should be seen not as a substitute for institutional reform but as a force that elevates the institutional challenge to all. When coordination is on the up and when investment is high, AI will be able to add value to the human capabilities that are available to improve service delivery and accelerate the expansion of the economy. The solution to this is good governance and cross-sectoral coordination, and the kind of commitment that is fundamental to the development of the human potential that is the basis of any lasting development.

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DOI https://doi.org/10.30525/2592-8813-2026-2-44

AN ASSESSMENT OF THE STRUCTURAL CHANGES GENERATED BY THE STRATEGIES OF "DEMOCRACY EXPORT" AND "REGIME CHANGE" ON POLITICAL STABILITY, GOVERNANCE CULTURE, AND PUBLIC LEGITIMACY IN THE ARAB WORLD

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Abstract. This article examines the structural transformations induced by the strategies of "democracy export" and "regime change" in the Arab world, with a particular focus on their implications for political stability, governance culture, and public legitimacy. Drawing on comparative political analysis and post–Arab Spring experiences, the study argues that externally driven democratization efforts have often produced fragmented institutional orders rather than consolidated democratic systems. While these strategies were normatively justified by the promotion of liberal values and accountable governance, their practical implementation frequently neglected local socio-political contexts, historical state–society relations, and existing governance traditions. As a result, many countries experienced weakened state capacity, contested legitimacy, and the proliferation of non-state actors, contributing to prolonged instability. The article further highlights that regime change interventions tended to disrupt established governance cultures without providing sustainable mechanisms for inclusive political participation, thereby undermining public trust in both domestic institutions and external actors. The findings suggest that democracy promotion strategies, when detached from endogenous reform processes, may generate adverse structural outcomes that hinder long-term stability and legitimate governance in the Arab world. The study contributes to ongoing debates on external intervention, state-building, and democratic transition by emphasizing the need for context-sensitive and institutionally grounded approaches.

Key words: democracy export; regime change; Arab world; political stability; governance culture; public legitimacy; external intervention; state-building.

Introduction. The strategies of "democracy export" and "regime change" have constituted central instruments of external intervention in the Arab world, particularly since the early twenty-first century and in the context of the Arab Spring. These strategies were largely justified by normative claims related to democratization, human rights protection, and the promotion of accountable governance. However, their practical outcomes have often diverged significantly from their stated objectives. Instead of fostering sustainable democratic transitions, many interventions have coincided with prolonged political instability, institutional fragmentation, and declining public trust in state authorities.

The core research problem addressed in this study lies in assessing the structural changes produced by these strategies and determining whether they have contributed to stable governance and legitimate political order in the Arab world. The relevance of this research is underscored by the persistence of conflict, authoritarian resilience, and governance crises across the region. Understanding how externally driven democratization and regime change strategies reshape political institutions, governance cultures, and legitimacy structures is crucial for both academic debates and policy-oriented discussions on intervention, state-building, and democratic transition.

The primary objective of this article is to critically evaluate the structural effects of "democracy export" and "regime change" strategies on political stability, governance culture, and public legitimacy in selected Arab states. The study seeks to move beyond normative assessments by providing an analytical framework that captures institutional, societal, and legitimacy-based transformations.

To achieve this objective, the article is guided by the following research questions:

- How have "democracy export" and "regime change" strategies altered the institutional structures of governance in the Arab world?
- What impact have these strategies had on political stability and state capacity in post-intervention contexts?
- In what ways have external interventions influenced governance culture and state–society relations?
- How have these processes affected public legitimacy and trust in political institutions?

By addressing these questions, the study aims to identify patterns of structural change and assess the long-term implications of external intervention strategies.

The article is organized into six main sections. Following the introduction, the discussion section synthesizes the core analytical assumptions and situates the research problem within broader debates on external intervention and political order. The next section presents the theoretical and conceptual framework and reviews the relevant literature on democracy promotion, regime change, and legitimacy in transitional political systems. The subsequent sections analyze the impact of these strategies on political stability and provide a comparative case analysis of Iraq, Libya, Egypt, and Tunisia. The final section concludes the article by summarizing the key findings, discussing their theoretical and policy implications, and offering directions for future research.

Discussion. The discussion of democracy export and regime change in the Arab world requires moving beyond a simple distinction between democratic intention and authoritarian resistance. The cases considered in this article show that external strategies produce structural effects through the interaction of foreign pressure, domestic institutional capacity, elite bargaining, and public expectations. Therefore, the central issue is not whether democratization is normatively desirable, but whether externally promoted political change can be absorbed by existing state institutions and translated into credible governance practices.

A key implication is that institutional design alone cannot secure political stability when coercive capacity, administrative continuity, and social trust are weakened. Elections, constitutional reforms, and accountability mechanisms may create formal democratic procedures, yet these procedures remain fragile when security institutions fragment or when political actors perceive the new order as externally imposed. In such contexts, democracy export may unintentionally intensify contestation by opening political competition before reliable mechanisms of conflict management and service delivery have been established.

The discussion also highlights the relational nature of public legitimacy. Citizens evaluate post-intervention authorities not only through formal rules but also through performance, sovereignty, and cultural intelligibility. Where new institutions provide security, services, and inclusive participation, legitimacy can gradually develop even under imperfect political conditions. Where interventions disrupt governance routines without creating credible domestic ownership, legitimacy becomes contested and political order remains unstable. This explains why negotiated and institutionally grounded reform processes have generally produced more sustainable outcomes than abrupt regime displacement.

Theoretical and Conceptual Framework

This article evaluates how "democracy export" and "regime change" strategies translate external power into internal political restructuring across the Arab world. The framework treats intervention not only as a discrete foreign-policy act (military, diplomatic, economic, informational), but as a multi-stage process that reshapes (i) coercive capacity and elite incentives, (ii) institutional design and governance practices, and (iii) the social foundations of legitimacy. The approach therefore links external intervention to structural political change through intervening mechanisms – security fragmentation, elite reconfiguration, administrative re-ordering, and narrative contestation – whose com-

bined effects determine whether political order stabilizes, hybridizes, or collapses (Heydemann & Lynch, 2024; Elayah & Lambert, 2023).

Liberal interventionism provides the normative claim that external action can accelerate liberal governance by protecting civilians, supporting democratic institutions, and enabling representative rule. Within this tradition, democratic peace theory is typically mobilized as a downstream justification: expanding the number of democracies is expected to reduce conflict propensity and strengthen predictable cooperation, thereby contributing to international and regional stability (Dunne et al., 2024). Applied to the Arab world, this logic assumes that externally supported political openings can generate institutional accountability and eventually produce a self-reinforcing legitimacy cycle – where performance (service delivery), procedure (elections/participation), and values (rights) converge into durable consent.

However, this article treats the liberal promise as **conditional**, not automatic. The causal pathway depends on whether intervention can (a) preserve or reconstruct coercive order, (b) prevent predatory competition among armed actors, and (c) enable institutions to develop local credibility rather than appearing externally scripted. When these conditions fail, "democracy export" can unintentionally generate governance overload – formal democratic templates without the administrative capacity or trust needed to make them legitimate in practice (Heydemann & Lynch, 2024).

Realist and neo-realist critiques foreground power, security dilemmas, and unintended consequences. From this view, regime change is less a democratizing instrument than a high-risk strategy that disrupts state authority, creates security vacuums, and incentivizes insurgency and civil conflict – dynamics that often outlast the intervention itself. A central empirical claim is that foreign-imposed leadership frequently faces incompatible audience demands: satisfying external patrons can undermine domestic credibility, while pursuing domestic legitimacy can alienate external sponsors, producing persistent instability (Downes, 2021).

For Arab cases, the realist lens highlights three structural risks. First, the dismantling or fragmentation of security institutions can turn "transition" into prolonged coercive competition. Second, externally aligned elites may be treated as politically inauthentic, weakening social compliance even when institutional design looks procedurally "democratic." Third, regional power rivalries can internationalize domestic contestation, making political reconstruction hostage to broader geopolitical bargaining (Elayah & Lambert, 2023). Within this critique, legitimacy is not primarily produced by elections or constitutional engineering; it is produced by security provision, credible authority, and negotiated elite settlements – none of which can be reliably imposed from outside (Downes, 2021; Dunne et al., 2024).

Post-colonial approaches reframe intervention as part of longer histories of hierarchical ordering, where "good governance" agendas can reproduce asymmetries between external "designers" and local "subjects." This matters because legitimacy is partly relational: publics evaluate authority not only by outcomes but by whether rule appears autonomous, culturally intelligible, and free from external tutelage. Post-colonial scholarship emphasizes that administrative practices – classification, mobility control, emergency rule – often persist as institutional legacies that shape how citizenship and belonging are governed, which can constrain democratization even after formal political change (Berda, 2022).

Constructivist perspectives complement this by specifying how legitimacy is socially produced: through norms, identity narratives, and interpretive frames that define what counts as "rightful rule." External intervention can therefore trigger legitimacy contestation by changing not only institutions but also the meaning of sovereignty, representation, and national identity. The "battle" is not only over who governs, but over which stories and standards make governance acceptable. New constructivist work is especially useful here because it treats ideas, expertise, and professional practices (e.g., constitutional advising, statebuilding templates, governance indicators) as mechanisms that travel across borders and restructure political possibilities in targeted states (McCourt, 2022).

Impact on Political Stability

External strategies of "democracy export" and "regime change" have had profound and uneven effects on political stability in the Arab world. Rather than producing linear transitions toward democratic consolidation, these interventions have frequently generated complex patterns of fragility, conflict, and partial restructuring. Political stability in post-intervention contexts must therefore be understood as a multidimensional outcome shaped by institutional continuity, security provision, elite bargaining, and societal legitimacy rather than by regime change alone (Downes, 2021; Heydemann & Lynch, 2024).

One of the most immediate consequences of externally driven regime change has been the weakening of state institutions. The dismantling or marginalization of existing bureaucratic and security structures – often justified as a means of removing authoritarian legacies – has in many cases undermined administrative capacity and disrupted basic governance functions. Ministries, courts, and local administrations have struggled to operate effectively in environments marked by legal uncertainty and contested authority.

Recent scholarship emphasizes that state fragility emerges not only from the collapse of leadership but from the erosion of routine institutional practices that sustain order and predictability (Elayah & Lambert, 2023). In several Arab cases, externally supported transitions introduced new constitutional or electoral frameworks without ensuring continuity in civil service systems, fiscal administration, or territorial control. This institutional disruption weakened the state's ability to provide security and services, thereby deepening public skepticism toward new political arrangements and amplifying instability (Heydemann & Lynch, 2024).

Regime collapse following external intervention has often created security vacuums that non-state actors rapidly filled. The breakdown of centralized coercive authority enabled militias, sectarian forces, and transnational armed groups to compete for control over territory and resources. Rather than serving as a transitional phase toward democratic governance, civil conflict became a self-reinforcing condition, locking political systems into cycles of violence and fragmentation.

Realist analyses underline that the removal of incumbent regimes without a viable security replacement structure significantly increases the likelihood of civil war and prolonged instability (Downes, 2021). In the Arab world, these dynamics were intensified by regional rivalries and external sponsorship of competing factions, which internationalized domestic conflicts and further weakened prospects for stabilization. As a result, political order in many post-intervention states became fragmented, with parallel authorities and overlapping claims to legitimacy (Dunne et al., 2024).

A central debate in the literature concerns whether short-term destabilization is an unavoidable cost of long-term political restructuring. Proponents of interventionist strategies argue that temporary disorder may be necessary to dismantle entrenched authoritarian systems and enable institutional renewal. However, empirical evidence from the Arab world suggests that prolonged instability often undermines the very conditions required for sustainable political restructuring.

Where instability persists, political actors tend to prioritize survival and security over institutional reform, leading to the entrenchment of hybrid or authoritarian governance models rather than democratic consolidation (Heydemann & Lynch, 2024). Moreover, long-term instability erodes social trust and political participation, weakening the foundations of public legitimacy essential for durable governance. Thus, the anticipated transition from short-term disruption to long-term stability has frequently failed to materialize, raising questions about the strategic assumptions underlying regime change policies (Elayah & Lambert, 2023).

A comparative perspective highlights significant variation in post-intervention outcomes across the Arab world. Relatively more stable cases tend to exhibit some degree of institutional continuity, negotiated elite settlements, and gradual reform processes that limit the scope of violent contestation. In these contexts, external involvement was more constrained or supportive rather than transformative, allowing domestic actors to retain ownership over political restructuring (Dunne et al., 2024).

In contrast, highly unstable cases are characterized by abrupt regime collapse, extensive institutional dismantling, and intense external interference in domestic power struggles. These conditions produced fragmented authority structures and chronic insecurity, impeding both state reconstruction and legitimacy formation (Downes, 2021). The comparison suggests that political stability is less dependent on the normative goals of intervention and more on the manner in which power transitions are managed, institutions preserved, and security ensured.

Overall, the impact of "democracy export" and "regime change" on political stability in the Arab world reveals a consistent pattern: interventions that prioritize rapid political transformation over institutional resilience and social legitimacy tend to generate enduring instability rather than sustainable political order (Heydemann & Lynch, 2024).

Table 1

Comparative Assessment of Stable vs. Unstable Post-Intervention Political Outcomes in the Arab World

Analytical Dimension	Relatively Stable Post-Intervention Cases	Highly Unstable Post-Intervention Cases
Mode of Intervention	Limited or indirect intervention; diplomatic pressure, mediation, conditional assistance	Direct military intervention; coercive regime removal
Institutional Continuity	Partial preservation of state institutions (bureaucracy, judiciary, security apparatus)	Extensive institutional dismantling and administrative collapse
Security Architecture	Retention or rapid reconstruction of centralized security forces	Fragmentation of coercive power; proliferation of militias and armed groups
Elite Configuration	Negotiated elite settlements; inclusion of old and new political actors	Violent elite competition; exclusionary power struggles
State Capacity	Gradual recovery of service delivery and fiscal governance	Persistent inability to provide basic services and territorial control
Public Legitimacy	Conditional but growing public acceptance of post-intervention authority	Deep legitimacy crisis and widespread distrust of governing institutions
Role of External Actors	Supportive and complementary to domestic political processes	Intrusive and competitive involvement by multiple external powers
Conflict Intensity	Low to moderate levels of political violence	Prolonged civil conflict and chronic insecurity
Governance Outcome	Hybrid or semi-authoritarian stability with incremental reform	State fragmentation, failed governance, or warlordism
Long-Term Political Trajectory	Managed political restructuring with relative stability	Entrenched instability and blocked state-building

Source: Author's compilation based on Downes (2021), Elayah and Lambert (2023), Heydemann and Lynch (2024), Dunne et al. (2024), and McCourt (2022)

The comparative table demonstrates that post-intervention political trajectories in the Arab world are neither uniform nor linear. Instead, outcomes vary systematically according to structural conditions shaping state authority, institutional resilience, security governance, elite relations, and legitimacy formation. The comparison highlights that political stability following external intervention depends less on the normative goals of democracy promotion and more on how power transitions are managed at the institutional and societal levels.

Mode of intervention constitutes the initial structural determinant of post-intervention stability. Cases characterized by limited or indirect intervention – such as diplomatic mediation, conditional economic assistance, and technical support – tend to preserve a degree of domestic political ownership. This enables political change to unfold through negotiated processes rather than abrupt rupture.

By contrast, direct military intervention and coercive regime removal frequently generate immediate power vacuums, disrupt governing routines, and undermine the state's ability to manage political competition, thereby increasing the likelihood of prolonged instability (Downes, 2021).

Institutional continuity emerges as a central stabilizing factor. Relatively stable post-intervention cases typically maintain segments of the pre-existing administrative, judicial, and security apparatus. Even when regimes change, the survival of bureaucratic practices allows the state to perform core functions and sustain minimum levels of governance. In highly unstable cases, widespread dismantling of institutions leads to administrative paralysis, weakens rule enforcement, and erodes public confidence in post-intervention authorities (Heydemann & Lynch, 2024).

Security architecture plays a decisive role in shaping political outcomes. Stable cases are characterized by the retention or rapid reconstruction of centralized coercive institutions capable of maintaining territorial control. Conversely, the fragmentation of security forces and the proliferation of militias in unstable cases transform political contestation into violent competition. Security vacuums not only fuel civil conflict but also empower non-state actors to establish parallel systems of authority, further undermining prospects for state reconstruction (Elayah & Lambert, 2023).

Elite configuration significantly influences whether political competition remains institutionalized or turns violent. In more stable trajectories, negotiated elite settlements – often involving both old and new political actors – reduce zero-sum power struggles and create incentives for compromise. In unstable cases, elite rivalry is intensified by external sponsorship and exclusionary politics, producing cycles of contestation that weaken state institutions and block consensus-based governance (Downes, 2021).

State capacity and service provision function as material foundations of legitimacy. Where post-intervention governments are able to gradually restore public services and fiscal administration, they tend to secure conditional public acceptance, even in the absence of full democratic consolidation. In contrast, persistent failures in service delivery deepen legitimacy crises and strengthen the appeal of alternative governance providers, including militias and informal networks (McCourt, 2022).

Public legitimacy in post-intervention settings is thus primarily performance-based and relational rather than procedural. In relatively stable cases, legitimacy develops incrementally through effective governance and reduced violence. In unstable cases, however, legitimacy deficits become entrenched due to perceptions of foreign imposition, ineffective authority, and chronic insecurity, resulting in widespread political disengagement and resistance (Heydemann & Lynch, 2024).

Finally, the role of external actors differentiates stable from unstable outcomes. Coordinated and restrained external involvement tends to complement domestic political processes, whereas fragmented and competitive interventions exacerbate internal divisions and internationalize domestic conflicts. When post-intervention governance becomes embedded in regional or global power rivalries, prospects for stabilization and legitimate state-building are significantly reduced (Dunne et al., 2024).

Comparative Case Analysis

This section provides a comparative case analysis of four Arab states, especially, Iraq, Libya, Egypt, and Tunisia to illustrate how different modalities of external intervention and domestic political management have produced divergent structural outcomes. The cases demonstrate that regime change and democracy promotion strategies interact with local institutional legacies, elite configurations, and security structures in ways that decisively shape political stability and legitimacy (Downes, 2021; Heydemann & Lynch, 2024).

Iraq: Regime Change and Institutional Fragmentation

Iraq represents a paradigmatic case in which externally imposed regime change resulted in deep institutional fragmentation. The abrupt dismantling of the Ba'athist state apparatus, combined with the disbandment of security forces, created a severe governance vacuum. Rather than enabling democratic consolidation, the intervention weakened bureaucratic continuity and fostered sectarianized elite competition.

Recent analyses emphasize that post-intervention Iraq evolved into a fragmented political order characterized by parallel power centers, weak state authority, and chronic insecurity. External involvement restructured elite incentives around identity-based mobilization rather than institutional accountability, undermining national cohesion and public legitimacy (Dodge, 2020; Downes, 2021). As a result, political stability remained elusive despite formal democratic institutions such as elections and constitutional governance.

Libya: External Intervention and State Collapse

Libya illustrates the most extreme outcome of external intervention: near-total state collapse. The removal of the Gaddafi regime through international military action eliminated centralized authority without establishing a viable post-conflict governance framework. The absence of institutional continuity and the proliferation of armed groups transformed Libya into a fragmented polity marked by competing governments and militias.

Scholarly accounts highlight that Libya's instability is rooted in the interaction between external intervention and weak pre-existing institutions. Without a professional bureaucracy or unified security sector, post-intervention governance became dependent on coercive non-state actors, eroding any prospect of legitimate state-building (Lacher, 2020; Elayah & Lambert, 2023). In this context, regime change did not initiate political transition but instead institutionalized fragmentation and prolonged conflict.

Egypt: Selective Democratic Transition and Authoritarian Resilience

Egypt presents a contrasting case where external and domestic pressures produced a short-lived democratic opening followed by authoritarian restoration. Unlike Iraq and Libya, the Egyptian state retained strong institutional coherence, particularly within the military and security apparatus. This continuity enabled the rapid reassertion of centralized authority after the collapse of the initial post–Arab Spring transition.

Recent literature frames Egypt as an example of authoritarian resilience rather than democratic failure. Selective political reforms and managed electoral processes provided limited pluralism while preserving core power structures. External actors prioritized stability and regional security over democratic consolidation, indirectly reinforcing authoritarian governance (Brownlee, 2021; Heydemann & Lynch, 2024). Consequently, political stability was restored, but at the cost of curtailed political freedoms and constrained public legitimacy.

Tunisia: Negotiated Transformation and Conditional Stability

Tunisia stands out as the most successful case of negotiated political transformation following the Arab Spring. Unlike cases of coercive regime change, Tunisia's transition was shaped by elite compromise, institutional continuity, and inclusive political dialogue. External support functioned primarily as facilitative rather than directive, allowing domestic actors to maintain ownership of the transition process.

Recent studies describe Tunisia's post-intervention trajectory as one of conditional stability. Democratic institutions were established, and political pluralism initially expanded, yet structural economic challenges and governance constraints limited long-term consolidation. While legitimacy was higher than in other cases, it remained performance-dependent and vulnerable to socio-economic pressures (Marks, 2020; Yerkes & Muasher, 2023). Tunisia thus demonstrates that negotiated transitions can enhance stability, but only when institutional reform is accompanied by sustained economic and social inclusion.

The Table 2 provides a comparative overview of post-intervention political trajectories in Iraq, Libya, Egypt, and Tunisia, highlighting how different forms of external intervention and domestic political management have produced divergent structural outcomes. It demonstrates that coercive regime change, as seen in Iraq and Libya, is closely associated with institutional dismantling, security fragmentation, and severe legitimacy deficits. In these cases, the absence of institutional continuity

Table 2

Comparative Case Analysis of Post-Intervention Political Outcomes in Selected Arab States

Case	Type of Intervention / Transition	Institutional Outcome	Security Dynamics	Governance & Legitimacy	Overall Political Trajectory
Iraq	Foreign-imposed regime change through military intervention	Extensive institutional dismantling; fragmented bureaucracy	Disbandment of security forces; sectarian militias	Low legitimacy; identity-based politics; weak state–society trust	Chronic instability and institutional fragmentation
Libya	External military intervention leading to regime removal	Near-total state collapse; absence of central authority	Security vacuum; competing militias and parallel governments	Absence of national legitimacy; localized authority	Prolonged state failure and civil conflict
Egypt	Selective democratic opening followed by authoritarian restoration	Strong institutional continuity, especially military	Centralized and cohesive security apparatus	Performance-based legitimacy; restricted pluralism	Authoritarian resilience with relative stability
Tunisia	Negotiated political transition with external facilitation	Preservation of core institutions; constitutional reform	Unified security sector with limited politicization	Conditional legitimacy based on consensus and performance	Managed transition with fragile but sustained stability

Source: Author's compilation based on Dodge (2020), Lacher (2020), Downes (2021), Brownlee (2021), Elayah and Lambert (2023), Heydemann and Lynch (2024), Marks (2020), and Yerkes and Muasher (2023)

and centralized coercive authority transformed political transitions into prolonged crises rather than pathways toward stable governance.

By contrast, Egypt and Tunisia illustrate alternative post-intervention patterns shaped by stronger institutional resilience and negotiated political processes. Egypt's experience shows that institutional continuity – particularly within the military and security apparatus – can restore political stability, albeit through authoritarian consolidation rather than democratic deepening. Tunisia, on the other hand, reflects a negotiated transition in which elite compromise and partial institutional preservation enabled conditional stability, though this remained vulnerable to economic pressures and governance challenges.

Overall, the table underscores that post-intervention stability in the Arab world is determined less by the normative objectives of democracy promotion and more by the interaction between security governance, institutional continuity, elite bargaining, and legitimacy formation. These comparative cases reinforce the argument that external interventions produce sustainable outcomes only when they support domestically anchored political settlements rather than abrupt regime displacement.

Conclusion. This study has assessed the structural changes generated by the strategies of "democracy export" and "regime change" in the Arab world, with particular attention to their effects on political stability, governance culture, and public legitimacy. The analysis demonstrates that externally driven democratization and coercive regime change have rarely produced the institutional and social foundations required for sustainable democratic governance. Instead, these strategies have often triggered deep structural disruptions, weakening state capacity, fragmenting security arrangements, and destabilizing established patterns of political authority.

With regard to political stability, the findings indicate that regime change interventions tend to generate short-term disorder that frequently evolves into long-term instability. The dismantling of

existing institutions and security structures, when not accompanied by viable replacement mechanisms, has contributed to civil conflict, elite fragmentation, and the proliferation of non-state actors. Even in cases where overt violence subsided, political order was often reconstituted through hybrid or authoritarian arrangements rather than democratic consolidation, underscoring the limits of externally imposed political transformation.

In terms of governance culture, the study shows that democracy export strategies have commonly introduced formal institutional models – such as elections, constitutions, and accountability frameworks – without embedding them in local administrative practices and political norms. This disconnect has produced governance cultures characterized by procedural formality but weak institutional effectiveness. In several Arab cases, external intervention disrupted existing governance practices without fostering inclusive decision-making or durable administrative capacity, thereby reinforcing patterns of patronage, securitization, and elite dominance rather than participatory governance.

Regarding public legitimacy, the analysis highlights a persistent legitimacy deficit associated with externally driven political change. Public acceptance of post-intervention authorities has been largely performance-based and contingent on security provision and service delivery rather than on democratic procedures alone. Where governance failed to meet basic social and economic expectations, legitimacy rapidly eroded, fueling political disengagement and resistance. Moreover, perceptions of foreign imposition undermined the symbolic and normative foundations of legitimacy, further weakening state–society relations.

Overall, the study concludes that democracy export and regime change strategies have generated profound structural transformations in the Arab world, but these transformations have rarely aligned with their stated normative objectives. Sustainable political stability and legitimate governance appear more closely tied to institutional continuity, negotiated elite settlements, and context-sensitive reform processes than to externally imposed regime change. The findings suggest that future approaches to political reform in the Arab world should prioritize domestically grounded pathways to change, support incremental institutional development, and recognize legitimacy as a socially constructed and performance-dependent outcome rather than a product of formal democratic design alone.

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DOI https://doi.org/10.30525/2592-8813-2026-2-45

CONCEPTUAL TRANSFORMATION OF THE NOTION OF SOLIDARITY IN THE CONDITIONS OF POLYCRISIS

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Abstract. The article explores the conceptual transformation of solidarity during modern crises that expose systemic weaknesses in state institutions. The research aims to conceptualize local solidarity initiatives as effective mechanisms of political power and drivers of social transformation in times of polycrisis. Moving beyond classical views of solidarity as mere state redistribution, the study justifies the concept of «solidarity from below» – the autonomous collective action of citizens. The core thesis argues that grassroots solidarity exceeds simple charity by generating a specific political «power-with» based on coordination and trust. Through the theories of «acts of citizenship» and commoning, the article demonstrates how everyday mutual assistance builds material solidarity infrastructures. The study concludes that autonomous solidarity practices form a de facto alternative governance system «from below», capable of influencing institutions, competing with official power, and redefining the boundaries of political participation.

Key words: solidarity from below, local initiatives, power-with, acts of citizenship, commoning, polycrisis.

Introduction. In modern political science, the concept of solidarity acquires a new, critical meaning in the face of constant challenges: political instability, wars, migration and climate crises, socio-economic inequality and a general decline in trust in institutions (Laitinen, 2022; Sangiovanni & Viehoff, 2023; Tava, 2023). Modernity clearly reveals the systemic weaknesses of many state apparatuses. During large-scale disasters and pandemics, familiar social systems and bureaucratic structures often prove inadequate, in particular due to the weakening of public infrastructure as a result of previous austerity policies (Carstensen et al., 2021; Mould et al., 2022; Spade, 2020). Traditional governance mechanisms do not have time to respond in a timely manner to the sudden needs of the population, which forms a kind of institutional «power vacuum». In response to this gap and the inability of state institutions to cover all urgent challenges, grassroots networks of mutual aid are rapidly emerging and consolidating throughout Europe, combining the efforts of traditional public organizations and spontaneous volunteer initiatives (Fernandes-Jesus et al., 2021; Mao et al., 2021; Mould et al., 2022).

Research problem and purpose. Historically, solidarity has been mainly considered as a state of social cohesion or a result of institutional order (Comte, 1842; Durkheim, 1984; Brunkhorst, 2005) .Modern European studies often limit this concept to state redistribution and the willingness of citizens or political communities to share risks and resources among themselves (European University Institute & YouGov, 2018 – present; Laitinen, 2022; Sangiovanni & Viehoff, 2023). However, the events of recent decades – from the financial crisis and the COVID-19 pandemic to Russia's war against Ukraine – have demonstrated the limitations of understanding solidarity exclusively as institutional integration or the policy of the welfare state (Carstensen et al., 2021; Fernandes-Jesus et al., 2021; Mould et al., 2022). Such a classical approach is unable to fully explain those forms of collective action that arise outside or on the periphery of formal institutions.

The purpose of this article is to conceptualize local solidarity initiatives as an effective mechanism of political power and a driver of social transformations in times of polycrisis. The study seeks to

eliminate the traditional emphasis on centralized power and focus attention on autonomous practices of self-organization and «guerrilla governance» (Canelas, & Baptista, 2021).

The central research question of the article is formulated as follows: how does «solidarity from below» (Zheng, 2023) transform from an ethical, moral practice of mutual assistance into a form of political power capable of influencing institutions, social norms, and trajectories of social change? The main thesis of the study argues that grassroots solidarity goes beyond a simple reaction to suffering or a lack of state capacity. It constitutes a specific form of political power – «power-with», which is generated through coordination of actions, mutual trust, collective decision-making, and the ability of the masses to act together. Local initiatives should not be reduced to charity or temporary volunteering in times of crisis. Their true political potential lies in changing the balance of power between citizens and institutions: where formal government acts slowly, ineffectively, or selectively, grassroots solidarity networks create their own capacity to organize life, meet the needs of society, and make tough demands on the existing political order.

Materials and Methods. The methodological framework of this research is grounded in a qualitative, conceptual-theoretical approach, integrating classical sociological paradigms with contemporary political philosophy. The research design is structured to ensure the reproducibility of the conceptual analysis by clearly defining the theoretical lenses applied to the phenomena of modern polycrisis.

The primary materials for this study consist of foundational texts in political science and social philosophy, contemporary academic literature on civic mobilization, and secondary empirical data documenting grassroots movements. The theoretical basis builds upon classical sociological theories of social integration (such as the works of É. Durkheim and A. Comte) (Comte, 1842; Durkheim, 1984) and modern political theories of power and citizenship (H. Arendt, G. Sharp, E. Isin, and G. Nielsen) (Arendt, 1970; Sharp, 1973; Isin & Nielsen, 2008). The empirical material, used for the contextual validation of theoretical constructs, includes secondary data regarding volunteer networks during the COVID-19 pandemic in Europe (specifically Italy) and civil society mobilization during Russia's war against Ukraine.

To achieve the research aim and ensure the logical consistency of the findings, a complex of general scientific and specific political science **methods** was applied:

- Conceptual Analysis: This method served as the primary tool for tracing the semantic and functional evolution of the notion of «solidarity». It was utilized to deconstruct the transition of solidarity from a purely moral bond and state-institutionalized mechanism to an autonomous political force conceptualized as «power-with».
- Comparative Method: Applied to systematically juxtapose two distinct models of civic integration: the top-down «organized solidarity» inherent in the welfare state, and the autonomous «solidarity from below» generated by marginalized or vulnerable groups. This comparison allowed for identifying the specific political agency of grassroots initiatives.
- Systemic-Functional Approach: This approach was employed to evaluate local mutual aid networks not merely as ad hoc humanitarian responses, but as structural elements of a de facto alternative governance system. Through the theoretical matrix of «commoning» and «guerrilla governance» (Spade, 2020; Mould et al., 2022, Canelas, & Baptista, 2021), the functional capacity of local initiatives to replace or compete with state institutions during a «power vacuum» was analyzed.
- Case Study Analysis (Secondary Synthesis): To verify the developed conceptual framework against objective reality, the study employed an illustrative case analysis based on secondary empirical data. The theories of «acts of citizenship» and nonviolent political action were used as analytical matrices to interpret documented civic mobilization processes during recent crises in Europe.

Historically, the concept of solidarity has been one of the key tools with which the social sciences have explained the possibility of social order and what holds individuals together within a community. In the classical sociological tradition, Auguste Comte linked social order to the problem of

integration, moral unity, and stability of society (Comte, 1842). In contrast, Emile Durkheim gave the concept a systemic sociological meaning, distinguishing between mechanical solidarity (which dominates traditional communities and is based on the similarity of members and shared beliefs) and organic solidarity (which arises in modern societies as a result of the division of labor, interdependence, and coordination of various social functions) (Durkheim, 1984). This classical theoretical framework solidified the understanding of solidarity as a force of social integration, the main function of which is to prevent disintegration and maintain moral order.

In political philosophy, particularly in the tradition of Jürgen Habermas, solidarity has acquired a normative meaning and has come to be seen as a necessary condition for democratic coexistence (Habermas, 1989; Habermas, 1990; Pensky, 2019). Habermasian logic suggests considering solidarity as part of justice: if justice establishes universal principles of equality and free liberties, then solidarity is responsible for supporting specific bonds of mutual responsibility between those who belong to a common form of life (Habermas, 1989; Tava, 2023).

In the process of development of modern societies, solidarity gradually lost the character of a direct moral bond between members of a local community and increasingly acquired institutionalized forms. If in traditional societies mutual support was mainly based on family, religious, class or local-social ties, then the modern state began to translate solidarity into the plane of law, citizenship and public policy (Brunkhorst, 2005; Laitinen, 2022; Sangiovanni & Viehoff, 2023). In this context, solidarity ceases to be just an ethical norm of coexistence and turns into an organizational principle of social order, which is fixed through legislation, tax systems, social guarantees, insurance mechanisms and institutions of state redistribution.

The emergence of the welfare state played a particularly important role in this process (Brunkhorst, 2005; Sangiovanni & Viehoff, 2023). It proposed a model within which responsibility for basic social risks – illness, unemployment, old age, disability, poverty or loss of working capacity – ceased to be considered as a private problem of an individual or his family. Instead, these risks were recognized as socially significant, and therefore as requiring a collective response. Through the systems of social insurance, pensions, health care, unemployment benefits and social support, the state institutionalized the principle of mutual responsibility of citizens for each other (Brunkhorst, 2005; European University Institute & YouGov, 2018 – present).

It is in this sense that we can speak of the formation of a model of «organized solidarity». Its essence lies in the fact that mutual support between members of a political community no longer depends exclusively on personal ties, voluntary charity or direct moral proximity. It is implemented through stable institutional mechanisms, primarily through the state, law and public administration. Taxes, social contributions, insurance funds and budget programs become instruments through which society redistributes resources between different population groups, generations, regions and social classes.

Within such a model, solidarity acquires a dual character. On the one hand, it is a normative principle, as it expresses the idea of justice, social responsibility and mutual dependence of citizens. On the other hand, it is an institutional practice, as it is embodied in specific mechanisms of state policy: social insurance, support programs for vulnerable groups, labor law, health care, education and social protection systems. Thus, solidarity in modern society becomes not only a moral requirement, but also part of the political and legal architecture of the state.

At the same time, the institutionalization of solidarity has ambivalent consequences. On the one hand, it ensures stability, predictability and universalization of social support, making it less dependent on random charity or local resources. On the other hand, such solidarity can become bureaucratized, distanced and passive. Citizens in this case often act not as active participants in mutual support, but as taxpayers or recipients of social services. As a result, solidarity risks turning from a living practice of collective action into an administratively organized mechanism for compensating for social risks.

The idea of the so-called «organized solidarity» has been formed, where mutual support is implemented through state mechanisms of redistribution and risk sharing. Modern European research (for example, the EUI-YouGov project «Solidarity in Europe») mainly interprets solidarity as the willingness of citizens and political communities to share burdens, risks, and resources among themselves.

However, the events of recent decades – the financial crisis, the COVID-19 pandemic, the migration crises, the housing crisis, and Russia's war against Ukraine – have clearly demonstrated the limitations of understanding solidarity solely as institutional integration or state redistribution (Carstensen et al., 2021; Fernandes-Jesus et al., 2021; Mould et al., 2022; Spade, 2020). This approach is effective for analyzing the welfare state, but it is not able to fully explain those forms of effective solidarity that spontaneously arise outside the boundaries of formal institutions. If we limit the concept of solidarity only to institutional cohesion, we miss out on those practices through which people without formal power create real political action. It is this tension between institutional and grassroots forms of solidarity that is fundamentally important for modern political science (Carstensen et al., 2021; Fernandes-Jesus et al., 2021; Mould et al., 2022; Spade, 2020). Institutional solidarity undoubtedly remains a key condition for the functioning of the welfare state and democratic citizenship. However, in conditions of polycrisis – when state institutions often do not have time to respond to rapid, complex and multi-level challenges – informal, local and civic practices of solidarity are becoming increasingly important. They do not deny the importance of the state, but demonstrate that solidarity cannot be completely reduced to institutional redistribution. It also exists as a living political practice of self-organization, mutual assistance and collective action «from below».

That is why modern political science needs a broader conceptualization and transition to the concept of «solidarity from below» (Spade, 2020; Mould et al., 2022; Laitinen, 2022). According to the philosophical approach of R. Zheng, solidarity from below is defined as «the collective ability of underprivileged people to organize for the sake of transformational change» (Zheng, 2023). That is, it is about uniting people (often from marginalized groups) who are able to act together to solve urgent social problems autonomously from the state.

This conceptual shift allows us to view solidarity not as a passive state of social unity, but as an active process of self-organization. In this process, citizens and local initiatives do not simply respond to a crisis or fill the gaps of bureaucratic systems, but collectively create alternative channels of support, produce new practices of mutual responsibility, and shape new forms of political subjectivity.

Local initiatives acquire political subjectivity through a specific construction of power relations, where the concept of «power-with» plays a key role (Arendt, 1970; Mori, 2003). This dimension is fundamentally different from the traditional hierarchical «power-over» based on control and coercion, since it arises exclusively from cooperation and mutual support. According to Hannah Arendt, political power is not the property of a single individual or institution, but arises as a result of the joint concerted action of people; it exists as long as this interaction is maintained, and disappears as soon as the joint action collapses (Arendt, 1970; Mori, 2003). Accordingly, «power-with» is generated through coordination, mutual trust and collective decision-making. Its transformative potential is based not on the ability to use force, but on the number and ability of the masses to refuse passive consent to the existing order. According to Gene Sharp's theories of nonviolent action, political systems depend critically on the cooperation and tacit consent of the population; when such consent is withdrawn, a powerful political lever is formed (Sharp, 1973). Thus, even small local initiatives are transformed into a form of political power for otherwise powerless people, capable of putting pressure on institutions and changing the logic of political responsibility.

A second mechanism for the politicization of solidarity networks is the rethinking of the concept of citizenship. Usually, citizenship is associated with formal legal status and legal affiliation to the state. However, modern theory, in particular the concept of «acts of citizenship» by E. Isin and G. Nielsen, suggests considering it as a dynamic process: subjects «become» citizens directly

through their actions and demands (Isin & Nielsen, 2008). By engaging in dialogue with the authorities or organizing mutual aid infrastructures, residents independently declare their needs, transforming themselves into active subjects of public power with their own political agency. Importantly, such practices allow effective citizenship to be asserted «from below» even by groups that are deprived of official status, such as migrants or refugees, since civic participation in this case is legitimized not through a passport, but through everyday solidarity activities and shared values (Isin & Nielsen, 2008; Spade, 2020; Mould et al., 2022). The third tool is the practice of creating commons (commoning) and the formation of «guerrilla governance» (Canelas, & Baptista, 2021). According to the approach of M. Hardt and A. Negri, commoning goes beyond simple collective access to resources and is aimed at directly constructing new forms of political organization (Hardt & Negri, 2009). Through everyday practices of caring for the commons – such as creating community kitchens, arranging shelters, or restoring housing – residents form new political communities and produce alternative models of governance (Spade, 2020; Mould et al., 2022; Carstensen et al., 2021). These joint actions generate material infrastructures of solidarity that allow communities to meet basic needs on their own. In crisis situations, when activists take on volunteer provision of critical areas, they effectively perform the functions of the state. This phenomenon is conceptualized as «guerrilla governance» (Canelas, & Baptista, 2021): a state in which residents initiate decisions, allocate resources, and transform urban space without waiting for permission from central authorities. (Spade, 2020; Mould et al., 2022) Collaborative networks do not simply respond to humanitarian challenges, but also build horizontal governance mechanisms and their own rules, creating viable institutions of power literally «from below».

Empirical measurements. Local initiatives not only unite people around shared values, but also generate effective material «solidarity infrastructures». (Spade, 2020; Mould et al., 2022; Carstensen et al., 2021) Rather than providing abstract support, such community-based approaches allow for the direct creation and re-creation of public goods, such as food or care services, by mobilizing communities beyond traditional institutions. Research confirms the political relevance of these processes. For example, Fiore et al. (2025), analyzing grassroots initiatives in the field of food policies, argue that they act as full-fledged political actors. (Fiore et al., 2025) These initiatives have their own political agency and power, with the ability to scale their practices on multi-stakeholder platforms and influence decision-making processes and socio-political change. In this way, local groups go beyond simple ad hoc assistance «on the spot» to form new, sustainable models of participation in political processes.

This is clearly demonstrated empirically by the unprecedented civic mobilization during recent crises, such as the COVID-19 pandemic and Russia's war against Ukraine. In particular, during the pandemic between February and May 2020, a dense network of solidarity practices emerged in Europe, uniting both traditional civil society organizations and spontaneous volunteer groups. (Carstensen et al., 2021; Fernandes-Jesus et al., 2021; Mao et al., 2021) In Italy, volunteer networks took on the responsibility of organizing food distribution and providing humanitarian aid to vulnerable groups that had been «forgotten» by the official state system (Carstensen et al., 2021; Fernandes-Jesus et al., 2021). Some local European experiences are illustrative: there, volunteer movements not only addressed basic humanitarian problems, but also created spaces of social and political participation, where even migrants and refugees were able to feel, live, and act as full citizens. They proposed an alternative model of citizenship based on an ethic of mutual care and the common good. The Ukrainian experience also highlights the critical role of civil society, which, through informal networks of mutual aid, demonstrates solidarity «from below», working autonomously from the state and filling gaps in bureaucratic responses to the crisis. It is important to note that such initiatives are not simply an auxiliary resource or an addition to the state apparatus, but act as an autonomous political mechanism. The nature of the interaction of these grassroots networks with state institu-

tions is multivariate and depends on specific conditions (Carstensen et al., 2021; Mould et al., 2022). Three main formats of such interaction can be distinguished: complementary, substitute, and conflict. Complementary interaction occurs when initiatives fill existing gaps in state policy, supplementing the actions of the authorities. The substitutive approach manifests itself in cases where volunteer or local movements temporarily replace completely absent state services. Finally, the conflictual format occurs when solidarity practices develop in opposition to the official actions of the authorities, exposing their incompetence and forming strict demands for policy change. Ultimately, regardless of the format chosen, these autonomous practices form a de facto alternative system of governance «from below» on the ground, capable of competing with official authorities and creating real opportunities for large-scale social transformations.

Discussion. The analysis presented above makes it possible to distinguish three analytical models of solidarity that clarify the conceptual transformation examined in this article. These models should not be understood as mutually exclusive stages or rigid categories. Rather, they represent different dimensions through which solidarity operates in modern political life: as a value, as an institutional mechanism, and as a discursive-political practice that can generate collective agency from below. Their comparison helps to explain why solidarity in times of polycrisis cannot be reduced either to moral compassion or to state redistribution alone.

The first model is normative solidarity (Comte, 1842; Durkheim, 1984; Habermas, 1989; Laitinen, 2022). In this sense, solidarity appears as a moral and political value that supports the idea of social cohesion, mutual responsibility and democratic coexistence. This model is rooted in the classical understanding of solidarity as a condition of social order. From this perspective, solidarity answers the question of why members of a community should recognize obligations toward one another. It provides the moral grammar through which mutual assistance, care and responsibility become politically meaningful. However, normative solidarity remains limited if it is not translated into practices, institutions or collective action. As a value, it may justify support, but it does not by itself explain how such support is organized, who participates in it, or how it transforms power relations.

The second model is functional or institutional solidarity (Brunkhorst, 2005; European University Institute & YouGov, 2018 – present; Sangiovanni & Viehoff, 2023). Here solidarity is understood as a mechanism of redistribution, risk-sharing and coordination. This model is most clearly embodied in the welfare state and in systems of organized solidarity, where social risks such as illness, unemployment, poverty or disability are no longer treated as purely private problems. Instead, they become matters of collective responsibility, addressed through taxation, social insurance, public services and administrative mechanisms. Functional solidarity therefore transforms moral responsibility into institutional practice. Its strength lies in stability, predictability and universalization of support. At the same time, its weakness is the risk of bureaucratization and passivity: citizens may become primarily taxpayers or recipients of services rather than active participants in mutual support.

The third model is political (discursive) solidarity (Pensky, 2008; Pensky, 2019; Spade, 2020; Mould et al., 2022). In this model, solidarity is not only declared or institutionally organized, but also articulated, claimed and performed through collective practices. It is produced through public narratives, civic demands, acts of citizenship and everyday practices of commoning. This model is especially important in times of polycrisis, when formal institutions often respond too slowly, selectively or inadequately. In such situations, solidarity emerges not merely as support for vulnerable groups, but as a form of political subjectivation. People become political actors by organizing aid, creating infrastructures of care, distributing resources, defending common goods and making claims on public authority (Table 1).

These three models reveal that the conceptual development of solidarity involves more than a shift in terminology. It reflects a deeper transformation in the relationship between citizens, institutions and political power. Normative solidarity explains the moral basis of mutual responsibility; functional

Table 1

Three analytical models of solidarity

Model of solidarity	Core meaning	Main political function	Limitation
Normative solidarity	Solidarity as a value, moral obligation and principle of social cohesion	Provides moral legitimacy for mutual responsibility and democratic coexistence	May remain declarative if not connected to institutions or collective action
Institutional solidarity	Solidarity as redistribution, risk-sharing and coordination through public institutions	Stabilizes society by transforming social risks into collective responsibilities	May become bureaucratic, passive and dependent on state capacity
Political solidarity	Solidarity as public claim-making, civic agency, commoning and collective action from below	Produces political subjectivity and transforms mutual aid into power-with	May remain fragmented if not connected to broader structures of coordination

solidarity explains how this responsibility is institutionalized through the state; discursive-political solidarity explains how citizens can reappropriate solidarity as an active practice of self-organization.

This last model is particularly important for understanding solidarity from below. Grassroots initiatives do not simply supplement institutional solidarity (Spade, 2020; Mould et al., 2022; Carstensen et al., 2021). They demonstrate that solidarity can become a direct source of political capacity. When citizens organize shelters, food distribution, care networks, reconstruction efforts or local systems of mutual aid, they do not merely compensate for state failure. They create material infrastructures of solidarity and generate new relations of trust, coordination and collective decision-making. In this way, solidarity moves beyond charity and becomes a practice of power-with (Arendt, 1970; Mori, 2003; Mould et al., 2022).

The proposed typology therefore helps to clarify the main conceptual movement of the article. Solidarity first appears as a foundation of social cohesion; then it becomes an institutional principle of organized redistribution and risk-sharing; later, under the pressure of polycrisis, it re-emerges as solidarity from below; and finally, it becomes a form of political power. (Comte, 1842; Durkheim, 1984; Brunkhorst, 2005; Sangiovanni & Viehoff, 2023) This transformation is crucial because it shows that solidarity is not only a response to crisis, but also a mechanism through which citizens redefine the boundaries of political participation and the meaning of democratic agency.

Thus, the political significance of solidarity from below lies not only in its humanitarian effectiveness, but in its capacity to transform the structure of power itself. Where institutional solidarity is delayed, insufficient or selective, grassroots solidarity creates alternative channels of coordination and support. Where formal citizenship excludes or marginalizes certain groups, acts of solidarity allow them to appear as political subjects. (Isin & Nielsen, 2008; Spade, 2020) Where the state fails to provide adequate care, commoning practices create new forms of collective governance. In this sense, solidarity becomes a bridge between social cohesion, institutional responsibility and political transformation.

Conclusion. The theoretical evolution of the concept of solidarity, considered in this article, can be described as a fundamental movement in three interrelated directions. The first vector demonstrates the transition from understanding solidarity as a basic social cohesion to its interpretation as an institutional principle of justice and risk sharing within the state. The second vector reflects the shift from purely institutional solidarity to «solidarity from below», which directly originates in local practices of self-organization. Finally, the third and most important vector captures the transformation of solidarity from simple moral support to a full-fledged form of political power. In the conditions of modern polycrisis, it is this third dimension that acquires critical importance, because it allows us to explain how local initiatives are able not only to mitigate the consequences of disasters, but also to

profoundly change social relations, political expectations and expand the boundaries of democratic participation.

The final thesis of our research is that the phenomenon of «solidarity from below» convincingly proves: local initiatives should not be reduced exclusively to charity, volunteering or temporary humanitarian aid. They constitute a much more powerful phenomenon – a specific political form of «power-with», which fundamentally changes the balance of power between citizens and official institutions. Where formal government acts slowly, ineffectively or selectively, grassroots networks create their own independent capacity to support the life of society and make strict demands on the existing political order. Thanks to the practices of commoning and the development of material support infrastructures, these autonomous initiatives form a de facto alternative system of governance «from below». Such a system is able not only to complement the state, but also to compete with official power structures, creating effective opportunities for social transformations on the ground. Ultimately, solidarity from below acts as an effective mechanism for social change, shifting the public agenda and redefining the very boundaries of the political, proving that full civic subjectivity can be constructed outside of traditional institutions.

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DOI https://doi.org/10.30525/2592-8813-2026-2-46

ARTIFICIAL INTELLIGENCE TECHNOLOGIES AS A TOOL OF CONTROLLED CHAOS IN MODERN INTERNATIONAL RELATIONS

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Abstract. This study examines the transformation of the "managed chaos" concept under the influence of artificial intelligence technologies in 2022-2026. Based on cases from Ukraine, the Middle East, and the South Caucasus, it demonstrates that generative AI, social media algorithms, and autonomous systems have reduced the cost of creating instability by thousands of times and removed this tool from state monopoly. The research proves that the main threat to small and medium-sized states is the loss of "narrative sovereignty" and "cognitive sovereignty". In response, the doctrine of "digital sovereignty" is proposed, encompassing technological, legal, educational, and diplomatic measures. For Azerbaijan, developing such a doctrine is of priority importance amid digital transformation until 2028.

Key words: Artificial Intelligence, Controlled Chaos, Digital Sovereignty, Cognitive Security, Information Warfare, Geopolitical Instability.

Introduction. Following the COVID-19 pandemic of 2020, a profound structural restructuring of the international system emerged. The Westphalian model of world order, based on the primacy of state sovereignty and in force since 1648, has entered a period of high turbulence in the face of globalization, digitalization, and shifting centers of power. The outbreak of the Russian-Ukrainian war in 2022, the escalation in the Middle East in 2023, and the waves of disinformation generated by artificial intelligence in over 70 countries from 2024 to 2026 indicate that the international system is drifting toward a state of "managed chaos."

The concept of "managed chaos" was introduced into academic discourse by Stephen Mann, a researcher at the US Army War College. In 1992, he substantiated this approach in his publication "Chaos Theory and Strategic Thinking" for the journal Parameters. The concept's essence lay in the fact that, after the Cold War, classical containment strategies had become ineffective. Therefore, a new tool was needed. Mann believed this could be achieved through the creation of "controlled instability" within the adversary state. Instead of direct military intervention, he proposed sowing "seeds of chaos" in the political, economic, and information spheres of the target country, in order to achieve major systemic shifts through small interventions at critical bifurcation points (Mann, 1992).

Over the past 30 years, this theory has been developed in various schools of strategy. American "color revolutions," Russian "network warfare," and China's "three wars" doctrine are essentially different forms of implementing "controlled chaos." However, since 2022, generative artificial intelligence has come to the forefront. The widespread adoption of tools like ChatGPT, Midjourney, and Sora has radically reduced the costs of producing text, images, and video. While in 2020, escalating tensions in a given country required months of work, troll factories, and budgets of millions of dollars, by 2025, a single operator with a subscription to AI services for several hundred dollars a day could generate up to a thousand fake news stories, images, and videos.

The purpose of this study is to determine whether artificial intelligence technologies are changing the essence of the concept of managed chaos or merely refining its tools. In other words, does artificial intelligence produce "qualitative" or "quantitative" changes in managed chaos?

The scientific novelty of this work lies in the fact that the synthesis of artificial intelligence and controlled chaos has not been comprehensively studied in the post-Soviet space, particularly in the South Caucasus. Azerbaijan's case is unique in this context.

Literature review. Both during and after the 44-day war of 2020, the country was subjected to intense information attacks. The dissemination of AI-generated fake voices and videos of President Ilham Aliyev on social media in 2023, as well as the coordinated bot activity surrounding the Zangezur Corridor, are characteristic signs of a new era. Therefore, studying the role of artificial intelligence in the application of controlled chaos technology is of fundamental importance for Azerbaijan. It is no coincidence that information security is identified as a priority in the "Action Plan for Accelerating Digital Development in the Republic of Azerbaijan for 2026-2028."

To analyze the concept of "controlled chaos," it's important to trace the migration of the term "chaos" from the natural sciences to political studies. Within the classical Newtonian worldview, systems were viewed as deterministic and predictable. In the second half of the 20th century, the development of nonlinear dynamics, Edward Lorenz's discovery of the "butterfly effect," and Benoit Mandelbrot's work on fractal geometry led to a shift in the scientific paradigm. It became clear that in complex systems, minimal deviations in initial conditions can cause large-scale consequences. In the early 1990s, this discovery attracted the attention of military strategists.

In his 1992 work, S. Mann formulated the key thesis as a question: if the destruction of an adversary's political system by military means is impossible, then is its self-destruction achievable through the initiation of internal destabilization? Mann identified four basic principles: (Mann, 1992).

a) Nonlinearity: Political systems are not characterized by a linear logic of development. A single press release or the resignation of a key official can trigger a domino chain reaction.

b) Self-organization: A system plunged into chaos can reorganize into a new configuration beneficial to an external actor, without direct control. The goal is "constructive destruction."

c) Bifurcation points: These are critical moments that determine the system's future trajectory. These include elections, economic crises, and natural disasters. At these points, minimal resources produce maximum impact.

d) Managed instability: This is not about complete chaos. The process must be controlled so that the target state is weakened, but at the same time, an all-out, uncontrolled war does not break out in the region.

According to Steven Mann, this strategy relies not on military but on informational, economic, and cultural levers of influence: non-governmental organizations, media, currency manipulation, and working with elites. While Mann developed the theory, American political scientist Gene Sharp compiled its "application manual." In his 1993 book, "From Dictatorship to Democracy," Sharp systematized 198 methods for nonviolent government overthrow. The principles of this work were later applied to the events of 2000 in Serbia, 2003 in Georgia, 2004 and 2014 in Ukraine, and 2011 in the Arab world. Sharp's methods are divided into three groups: a) Protest and Persuasion; b) Refusal of Social, Economic, and Political Cooperation; and c) Nonviolent Intervention.

Discussion. Despite Sharp's claims that his method was designed for democratic transformation, critics insisted that this technology could be used to overthrow any legitimate government. Therefore, Sharp's work is considered a "soft power" approach within the framework of managed chaos.

First, the "Frankenstein effect." The actor initiating a process often loses control over it. This happened in Afghanistan in 1980, Iraq in 2003, and Libya in 2011, when the chaos unleashed spread to a significantly larger territory than planned, creating threats for the initiator.

Second, there is the problem of moral and political legitimacy. The creation of crises by democratic states on the territory of other countries is contrary to the UN Charter and international law. Therefore, such operations are always denied and carried out under the guise of "civil society" or "support for democracy."

Third, there is the "vaccination effect." States have learned from the experiences of 2000–2020. China, through the "Great Firewall," Russia, through the "Sovereign Internet," Iran, through the "Halal Internet," and Azerbaijan, through tightening media legislation after 2016, have developed immunity to classic "color revolution" techniques.

It was this "vaccination" that prompted the search for new tools. When traditional NGOs and television channels ceased to be effective, artificial intelligence took their place, partially solving all three of the above-mentioned problems: 1. Due to its low cost, the costs of a "Frankenstein effect" are minimal. 2. Attribution is difficult: proving who exactly created a deepfake is extremely difficult. 3. "Vaccination" does not yet exist, as legislation lags behind the development of AI technologies.

As we recall, in the 1990s, NGOs, radio stations, and currency manipulation were cited as the primary tools of controlled chaos. In today's world, generative artificial intelligence, social media algorithms, and autonomous platforms top this list. Artificial intelligence doesn't change the essence of the theory, but it revolutionizes three of its key parameters: a) cost, reducing expenses by 100–1000 times; b) scale, transforming individual operations into mass ones; c) attribution, obscuring the author. Together, these three factors take "chaos" out of the hands of elites and "democratize" it. What was previously only possible with the intelligence services of an entire state can now be accomplished by a group of three.

2023 marked a turning point in the transformation of artificial intelligence into a fully-fledged tool of political struggle. Empirical analysis of incidents in Slovakia and the South Caucasus allows us to classify generative AI as a strategic weapon within the concept of controlled chaos: a) In Slovakia, the use of a cloned voice of an opposition leader immediately before the 2023 parliamentary elections demonstrated a critical vulnerability in democratic procedures. In the recording, opposition leader Michal Šimečka allegedly discussed vote-buying with a journalist. Forty-eight hours later, an expert analysis proved that the voice had been cloned using the ElevenLabs platform. However, those 48 hours proved fatal: Šimečka's party lost the election by 2%. Slovakia's example demonstrated that the speed of debunking AI-fabricated lies lags tenfold behind their dissemination; b) The dissemination of a deepfake featuring the President of Azerbaijan in the context of the "Zangezur Corridor" revealed a new level of synthesis quality, with flawless synchronization of facial expressions and background noise. Six hours later, Azerbaijani officials announced that the video had been created using AI. This incident symbolizes the final transition from the era of fragmentary retouching to a "synthetic reality," where audiovisual evidence ceases to be an objective source of truth, creating a fundamental crisis of trust in information.

The growing scale of fake news is primarily due to the thousandfold reduction in the cost of its production due to the widespread availability of AI tools. For example, while just 10 years ago, producing one minute of professionally doctored video in a Hollywood studio cost $50,000–$100,000, today, using a combination of the HeyGen, ElevenLabs, and RunwayML platforms, similar quality can be achieved for just $8 and 20 minutes. This 10,000-fold reduction in cost means that "controlled chaos" is no longer a "state monopoly." Radical groups, business cartels, and even individuals motivated by vengeance have gained access to these tools.

In the text sphere, the revolution is even more profound. According to a May 2025 report by OpenAI, in 2024 alone, the company dismantled more than 250 "coordinated inauthentic behavior" (CIB) networks linked to state structures. Using GPT-4 and Claude, these networks generated up to 1 million unique comments, tweets, and articles daily. Previously, a troll factory required an office with 300 employees and a monthly budget of $1 million. Today, three people and a $2,000 API key are sufficient. Thus, it is becoming clear that in the modern world, the information space is increasingly polluted by "synthetic text," and the truth is dissolving in information noise (OpenAI, 2025).

The second area of AI application is algorithms. Facebook, X, TikTok, and YouTube all prioritize content that evokes "anger and fear" to maximize user retention. Studies have shown that false news spreads six times faster than true news because it evokes greater emotional arousal.

For an architect of controlled chaos, these are ideal conditions. All that's required is to plant a "seed" in the form of a single provocative deepfake. The algorithm will do the rest: it will deliver the content for free to those prone to anger, fear, or doubt. In 2024, before the resignation of Bangladeshi Prime Minister Sheikh Hasina, a deepfake circulating on TikTok about a "police attack on a mosque" gained 30 million views in 48 hours, sparking street riots. The video actually showed a mosque in Indonesia in 2019, but the algorithm measures engagement, not context.

The third area is the physical dimension. Many military experts have called the 44-day war "the first algorithmic war." The Bayraktar TB2, Harop, and Orbiter UAVs are more than just flying cameras. They are capable of independently identifying targets, prioritizing them, and making decisions as part of a "swarm." The role of the human operator is limited to confirming the "fire" command, and in some cases, even this function is delegated to AI.

The AI system "Lavender" used by Israel in Gaza in 2023-2024 identified 37,000 Palestinians as "Hamas members." The system makes a decision in 20 seconds, while the operator spends an average of 9 seconds pressing the "confirm" button. An investigation by +972 Magazine found that the system's error rate is 10%. This means that 3,700 civilians could have been targeted due to an algorithmic error. This is a new level of controlled chaos: physical chaos is generated by the algorithm itself, making decisions faster than humans. In other words, the bifurcation point, the line between peace and war, is now in the hands of software code, not humans.

The most dangerous function of artificial intelligence remains invisible: AI is now capable of independently planning the "chaos operation" itself. Anthropic's "Red Team" report for 2025 notes that when asked to "plan a three-month media campaign to weaken the government in country X," the system generated a 12-page detailed plan, including:

Identification of "pain points" for each segment: for example, "drug prices" for pensioners or "unemployment" for young people.

A weekly narrative calendar.

A database of 500 ready-made tweets for bot networks.

A list of "useful idiots": local influencers who can unknowingly broadcast predetermined messages.

Previously, developing such strategies required think tanks like the RAND Corporation, months of work, and multi-million dollar budgets. Today, one query takes 30 seconds. Thus, AI becomes the "brain" of controlled chaos, acting not only as an executor but also as a chief of staff.

Case Study Analysis: 2022–2026

To test the theoretical framework in practice, we select three main conflict zones of the last four years: the Russian-Ukrainian War, the Middle East, and the South Caucasus. This choice is not random:

The first case represents a global testing ground for "AI warfare."

The second case demonstrates the use of AI by asymmetric actors, i.e., non-state actors.

The third case reveals the specific risks faced by small states and is directly related to the current security environment of Azerbaijan.

After 2022, the Russian-Ukrainian War became the first large-scale example of the systematic use of artificial intelligence in the military and information spheres. From the early stages of the conflict, AI tools were actively used in intelligence, propaganda, and decision-making.

– OSINT and battlefield analytics: AI tools from organizations and platforms such as Bellingcat, Primer AI, and Palantir provided real-time analysis of satellite imagery, social media videos, and open-source data. AI-enabled command and control systems accelerated target identification and fire coordination in the conflict zone. Simultaneously, drones such as the Shahed and Lancet began using AI algorithms for route optimization and target recognition.

– Information warfare and deepfakes: Deepfakes, fake video messages purporting to be from heads of state, were widely distributed in the first months of the conflict. The aim of these actions was to cre-

ate confusion and panic among the population. According to Meta's 2024 Adversarial Threat Report, over 70% of coordinated inauthentic activity detected on social media between 2022 and 2024 relied on AI-generated content. Bot networks and fake calls for surrender were deployed en masse to create controlled chaos.

– Autonomous Systems and Escalation Risks: The use of AI-controlled drones has expanded. Maritime drones, kamikaze drones, and long-range UAVs have been directed at targets with minimal human intervention. While this has increased the speed of decision-making, it has also increased the risks of misidentification and civilian casualties. Experts note that the integration of AI into the battlefield accelerates the escalation spiral: when a machine makes a decision in seconds, humans have no time for a political or diplomatic response (Bellingcat, 2023; Meta, 2024).

Thus, AI has ceased to be a supporting tool and has become a doctrinal element of modern conflict. The concept of "controlled chaos" has undergone a technological upgrade: information operations that previously took months to plan are now executed in a matter of hours, at a lower cost and reaching a wider audience.

The escalation that began with the Hamas attack on October 7, 2023, marked the culmination of AI use by non-state actors. Hamas's media wing, Al-Qassam, released 4K videos shot with GoPro cameras, edited with AI, and accompanied by an emotional musical score just two hours after the attack. These videos, with their narrative of "heroism," garnered 500 million views on TikTok, Instagram Reels, and Telegram in just a few hours. In response, the Israel Defense Forces deployed an AI system called "Lavender" at full capacity. An investigation by +972 Magazine and Local Call in 2024 revealed how Lavender operates: the system analyzes mobile phone metadata, social media activity, and even WhatsApp group chats of 2.3 million Gazans, assigning each a score from 1 to 100, reflecting their likelihood of belonging to Hamas. 37,000 people scored over 90 and were added to a "target pool." The decision to launch a strike is made within an average of 20 seconds. The human operator's role is reduced to simply pressing the "confirm" button. The result: despite the system's 10% error rate, it was used for speed. This is what "algorithmic chaos" is all about—machines make decisions, and human responsibility is blurred.

The opposing side was also not lagging behind in its use of AI. In 2024–2025, Hamas and Hezbollah used the Sora and Kling neural networks to create hyper-realistic videos depicting the destruction of Israeli cities. The goal was to provoke panic in Israeli society and foster the belief that "the state is incapable of protecting us." Although Israel's anti-fake news unit debunked the videos, a 24-hour delay was enough for millions to believe them. Thus, the Middle East case demonstrated that AI gives the weaker side a "weapon of influence" against the stronger, and the stronger side a "weapon of speed." Controlled chaos becomes a two-way street.

After 2020, the South Caucasus became one of the regions in the world with the highest density of "information fire." During the 44-day war, both sides turned X, Facebook, and Telegram into their main battlefields. However, after 2022, the struggle entered a new phase with the use of AI.

Armenian segment: A 2023 report by the independent Digital Research Center noted that after the border clashes of September 2022, 17,000 new accounts appeared on the X platform. 63% of these accounts had biographies written using ChatGPT, and 80% had profile photos generated by StyleGAN. These accounts published 200-300 tweets per day, building them around three key narratives: 1. "Azerbaijan is carrying out ethnic cleansing"; 2. "The Zangezur Corridor will divide Armenia"; 3. "Russian peacekeepers must leave, the West must come." A sign of coordination: 95% of the accounts ceased activity between 3:00 and 5:00 AM Baku time, indicating shift work. This is a classic implementation of Mann's principle: to damage the adversary's international image and create diplomatic pressure at minimal cost (Digital Forensic Research Lab, 2023).

Azerbaijani segment: A dangerous precedent was set by a fake video of President Ilham Aliyev, which circulated in November 2023, allegedly "abandoning Zangezur." The video was produced

using HeyGen and ElevenLabs. The articulation, voice timbre, lighting, and shadows were so realistic that even experts were unable to immediately detect the fake. Despite six hours of official denials from Azerbaijani authorities, Armenian and some Western media outlets used the video as a source. The goal: to sow seeds of doubt in Azerbaijani society and create the illusion of secret government deals. This is a direct application of "controlled chaos": undermining trust in the elite and paralyzing decision-making.

Bot farm economics: According to a 2024 report by Graphika, a month-long AI bot campaign in the South Caucasus costs $5,000-$7,000. Creating a deepfake with a reach of millions costs $500-$800. For comparison, in the 1990s, an hour of Radio Liberty broadcast cost $50,000. The cost has decreased 100-fold, while the impact has increased, as radio can be turned off, while AI content is virtually impossible to completely remove from the internet (Graphika, 2024).

An analysis of three case studies allows us to draw the following generalizations:

– Demonopolization of chaos: AI has freed "controlled chaos" from the monopoly of states. The Ukraine case demonstrated that ordinary citizens can become intelligence agents with the help of OSINT.

– Asymmetry of influence: The Gaza case demonstrated that an asymmetric actor can, with the help of AI, seize the global agenda.

– Threat to narrative sovereignty: The Caucasus case demonstrated that for small states, the main threat is not military aggression, but the loss of "narrative sovereignty." If someone else writes a story about you using AI, you cease to be the subject of your own destiny.

Great powers such as the United States, China, and Russia have the resources to create a "digital shield" against AI chaos.: their own large language models, national social networks, and traffic filtering systems like the "Great Chinese Firewall." Small States do not have such resources. Azerbaijan, Armenia, and Georgia are all critically dependent on American platforms. To get the Armenian bot farm blocked in X or Meta, it takes about 6 months of correspondence, collection of evidence and the participation of lawyers. In these 6 months, the damage has already become irreparable.

The second problem is the resource imbalance. 1,000 dollars is enough to organize a million-dollar deepfake campaign. It takes 100,000 dollars and a year of time to expose it, officially refute it, and prosecute it. There is a financial gap of 1 in 100 and a time gap of 1 in 365 between the aggressor and the victim. This is a classic asymmetric war in which the defending side, acting within the framework of traditional procedures, inevitably loses.

In response to these challenges, the concept of "digital sovereignty" has emerged in political science over the past five years. It presupposes control over data, algorithms, and narratives as well as over physical territory. The concept is based on four pillars:

Technological pillar: The use of domestic or trusted partner AI solutions in critical infrastructure. For example, the transfer of document flow to government agencies is not a ChatGPT, but a local LLM hosted in a national data center.

Legal pillar: Mandatory labeling of AI-generated content; criminal liability for malicious deepfakes; obligation of platforms to remove fakes within 24 hours. The EU under the AI Act 2024 and China under the Deep Synthesis Provisions 2023 are already following this path.

The educational pillar: The formation of the "media immunity" of the population. Finland has been implementing lessons in critical thinking and fake recognition since 2016. The result of the 2022 survey: 85% of Finns recognize deepfakes, compared to the European average of 41%. Victory over chaos is achieved not only by technology, but also by consciousness.

The diplomatic pillar: The AI arms control regime. An international treaty prohibiting the use of AI for destructive political purposes, similar to nuclear weapons. In 2023, the UN General Assembly adopted the first resolution on this issue, but it is advisory in nature.

The document "The Concept of Digital Development 2025-2028" lists information security as a priority. This strategy can be strengthened in three ways, taking into account the risks of "controlled chaos":

The National Center for Refutations (NCOC) is a 24/7 structure based on official security agencies, the Ministry of Foreign Affairs and the Media Development Agency. The center must analyze deepfakes using AI in 15 minutes and have a direct hotline with international platforms. The goal: to move from a 6-hour delay to a 15-minute reaction.

"Educational mobilization": The introduction of the discipline "Digital Hygiene" in grades 9–11 of secondary schools from 2026. Topics: deepfake recognition, bot detection, source verification. The goal is to create "media immunity" for 70% of the population by 2030.

South Caucasian Code of Ethics for AI: Azerbaijan may initiate a regional agreement with Georgia and Turkey to stop using political deepfakes and bot farms against each other. This will create an atmosphere of trust and become an instrument of pressure on Armenia: either join or remain isolated.

Conclusion. The study proved that artificial intelligence does not cancel the theory of "controlled chaos", but, on the contrary, transfers it from the "industrial era" to the "digital" one. AI has made three revolutionary changes:

It has reduced the cost of creating chaos by 10,000 times.

Increased the scale of impact from the individual level to billions of audiences.

It anonymized the author, effectively absolving him of responsibility for the consequences.

The cases of 2022-2026, Ukraine, Gaza, and the South Caucasus have demonstrated that the new battlefield is not territory, but consciousness. The winner is not the side with the most tanks, but the one with the dominant narrative. In these circumstances, state sovereignty is measured not by tanks and borders, but by algorithms and data.

This is an existential challenge for small and medium-sized States. They have two ways: either accept the concept of "digital sovereignty" and build a shield in the technological, legal, educational and diplomatic spheres, or turn into an object of other people's scenarios in the "synthetic reality" created by AI.

The Republic of Azerbaijan is facing a historic opportunity. Having become one of the first states to use the "UAV revolution" in the 44-day war, today the country can become the first state in the post-Soviet space to form the doctrine of "digital sovereignty". This requires political will, a synthesis of science and education, as well as active international cooperation.

The direction of future research is obvious: the recognition of AI as a weapon in international law, the role of the UN Security Council in this area, and the legal contours of the "arms control regime in the field of AI." If it took us 70 years to limit nuclear weapons, then humanity may not have such a reserve of time in the case of artificial intelligence.

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DOI https://doi.org/10.30525/2592-8813-2026-2-47

ELIZABETH II AS A PHENOMENON OF SUPRAPOLITICAL META-AUTHORITY IN A MEDIATIZED SOCIETY

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Abstract. The article analyzes the image of Queen Elizabeth II in global cultural memory and examines the phenomenon of her suprapolitical meta-authority. The aim of the study is to identify the mechanisms through which the symbolic legitimacy of the monarchy was formed under conditions of a mediatized society and historical turbulence. It is demonstrated that the Queen's long reign shaped a unique type of symbolic power grounded in repetition, ritual, and the moral authority of service. The paper substantiates the thesis of the symbolic conclusion of the "long twentieth century" and the transition to an era of accelerated historical time. Particular attention is devoted to the role of television and digital media in constructing the phenomenon of the "televisual monarchy." The study concludes that Elizabeth II's mode of rule serves as an indicator of emerging models of symbolic leadership in the twenty-first century and as their benchmark. Methodologically, the research relies on an interdisciplinary approach combining historical analysis, political anthropology, media studies, and cultural memory studies.

Key words: Elizabeth II, monarchy, meta-authority, symbolic power, suprapolitical leadership, media ritual, cultural memory, digital era, historical time.

Introduction. The death of the Queen provoked an unprecedented wave of global reaction that extended far beyond a political or national event. The scale and character of public mourning indicated that this was not merely the conclusion of a reign, but the loss of a particular form of symbolic presence that for decades had functioned as a stabilizer of historical time. This circumstance raised a broader scholarly question: how is suprapolitical authority formed in the contemporary world, and why did the figure of the British Queen become one of the most striking examples of such a phenomenon?

Despite the considerable number of historical and political studies devoted to the British monarchy, the phenomenon of collective memory surrounding Elizabeth II remains insufficiently conceptualized within an interdisciplinary framework. Particular attention should be given to the integration of historiographical, anthropological, and media-analytical approaches, which make it possible to consider the monarchy not merely as a political institution, but as a symbolic system capable of constructing perceptions of duration, stability, and moral legitimacy.

Thus, the research problem lies in identifying the mechanisms underlying the formation of global memory about Elizabeth II and clarifying the role of media, rituals, and cultural representations in shaping the phenomenon of suprapolitical leadership under conditions of transforming publicness (Clancy L., 2019).

The aim of this article is to provide a comprehensive analysis of the image of Elizabeth II as a symbolic center of stability in global cultural memory and to determine the historical, media-related, and anthropological factors that ensured the formation of her suprapolitical authority, as well as its place in the transition from the "long twentieth century" to the digital age.

Main text. At the outset, it should be noted that the theoretical foundation of this study rests upon the concepts of collective memory developed by M. Halbwachs (1992), cultural memory as elaborated by J. Assmann (2011), as well as approaches to media rituals and media events proposed by D. Dayan and E. Katz (1992) and N. Couldry (2003). Reference to these theoretical frameworks makes it possible to interpret the figure of Elizabeth II not merely as a historical monarch, but as a symbolic node of cultural memory within a mediatized public sphere (Goldenshtein K. O., 2023).

Throughout the twentieth and twenty-first centuries, the British monarchy existed not only as a politico-legal construction but as a system of symbolic presence – an identifiable "form of order" that outlived changes in governments, ideologies, and media environments. However, it was precisely during the reign of Elizabeth II that this presence acquired a particular degree of personalization: "The Queen" ceased to function as a general title and became a proper name requiring no clarification.

In this phenomenon, the linguistic contraction itself is less significant than the fact that the title lost its multiplicity and came to denote a specific individual in public consciousness (Petrakov M. O., 2024).

This effect was not the result of demonstrative exceptionalism or charismatic pressure, since throughout her reign Elizabeth II consistently emphasized not her "specialness," but the very form of service (The Royal Family, 1952). The effect of uniqueness was formed gradually, through the repetition of the experience of encountering the same stable figure at key points of historical time – that is, through the accumulation of mediatized ritual "testimonies of presence," rather than through political articulation. (Couldry N., 2003).

"The second half of the twentieth century and the first quarter of the twenty-first century in the history of Great Britain may be characterized as the era of Queen Elizabeth II (or the 'Second Elizabethan' era). Her record-breaking reign was marked by the transformation of the British monarchy toward modernization, comprehensive changes in the political system of the state, and shifts in its international position after the Second World War" (Hrubinko, Buhlai, 2022:136).

It is important to delineate the historical and territorial framework of her reign. It lasted from 1952 to 2022 and was the longest in the history of the British monarchy. During this period, fifteen prime ministers served in the United Kingdom – from Winston Churchill to Liz Truss – an indicator in itself of an extraordinary degree of institutional continuity personified in the figure of the monarch (Dayan & Katz, 1992).

Equally significant is the fact that at the moment of Elizabeth II's accession to the throne, the British Empire still retained substantial colonial possessions, whereas at the time of her death the United Kingdom functioned as a post-imperial state within the context of mature globalization. The biographical arc of the monarch almost mirrors the key transformations of the global political order in the second half of the twentieth and the first quarter of the twenty-first centuries (Markovich S. G., 2022).

Let us also provide several important biographical details. Elizabeth Alexandra Mary Windsor was born on 21 April 1926 in London. Her accession to the throne on 6 February 1952 was not originally anticipated in historical terms: as the daughter of the second son of King George V, she was not considered a direct heir.

"The reign of Queen Elizabeth II (full birth name – Elizabeth Alexandra Mary Windsor) formally and legally began in 1953 following her coronation at the age of 27, although de facto she ascended the throne immediately upon the death of her father in February 1952. From birth, the princess appeared to have no real prospect of becoming head of state, as clear favorites – her uncle and her father – stood ahead of her in the line of succession. Elizabeth's early accession resulted from the abdication of her uncle Edward VIII (who reigned for only eleven months) and the premature death

of her father, George VI. At the same time, Elizabeth's rapid assumption of power signified for British society an additional impulse for post-war recovery" (Hrubinko, Buhlai, 2022: 138).

In this context, it is symbolically significant that the moment of her transition from private life to the role of monarch occurred without special effects or spectacle – on 6 February 1952 she learned of the death of her father, George VI, and of her own accession while on an official visit to Kenya: "in an instant" she ceased to be a princess and became Queen. This situation, in which the accession took place "outside the palace," on a journey, that is, under circumstances where even the staging of a public gesture was impossible, proved to be a meaningful metaphor for her understanding of rule: the transition to the archetype of the Ruler begins not with triumph, but with the awareness of service (The Royal Family, 1992).

It is noteworthy that several years prior to this event, during a visit to South Africa in 1947, Elizabeth publicly articulated her vow of service, declaring that "her whole life – whether it be long or short – shall be devoted to your service" (The Royal Family. "Annus horribilis" speech, 24 November 1992). In retrospect, this early formulation became one of the key elements of her subsequent symbolic image: the promise, which later "coincided" with the fact of longevity, began to function as a source of legitimation through consistency (ABC Australia, 2015).

"By her personal example, Elizabeth II demonstrated the possibility of combining monarchical traditions with innovative forms of court and royal family activity, in such a way that Britons and the entire world, even after the ruler's death, continue with fascination to follow the 'series' about the life and passions of the royal court in the British manner" (Hrubinko, Buhlai, 2022:137).

The transition of an ordinary monarchy into a "televisual" one was likewise emblematic: it is recorded that approximately 27 million viewers in Great Britain watched the broadcast of the coronation on 2 June 1953, while the global audience may have reached around 200 million people (Thompson, 1995).

For many British families, this event became the impetus for acquiring their first television set – symbolically uniting traditional monarchical ritual with the new era of mass media (Nora, 1989).

Subsequently, the obligatory "maintenance of form" by the Queen continued for such a long period that it ceased to be perceived merely as a strategy and began to be experienced as a natural state. It was precisely inner discipline, multiplied by temporal duration, that created the sense of a natural correspondence between title and person: in all events one could observe that the personal never outweighed the official, while the official did not require theatrical self-denial. In this sense, the media world captured not a "persona," but rather the palette and rhythm of an assumed role: sincerity in service and reliability in the repetition of meanings, the predictability of gestures, dignity, and restraint in conduct (Connerton, How Societies Remember, 1989; Dayan & Katz, 1992).

Throughout her long service one can observe a gradual transformation: the Queen ceased to embody monarchy in the traditional sense of the word – as merely an institution of governing power. Monarchy then began to exist through her in a meta-role – as a way of being present in a world that increasingly lost trust in institutions and sought more comprehensible human forms of authority (Halbwachs, 1992).

Against the historical background of her reign – with wars, ideological ruptures, the dissolution of the imperial structure, waves of terrorism, and shifts in the global balance – the image of Elizabeth II acquired the significance of a kind of historical constant (The Royal Family, 1992). This is particularly important for societies in which modern experience is often lived as a critical experience of rupture: when each new event claims to mark the "end of an era," destroys previous semantic supports, and compels a near-total redefinition of reality (Sky News, 2022).

Certainly, her constant presence did not so much halt change as provide it with boundaries. The very fact that within the space of state symbolism there existed such a figure – one who did not alter her tonality in accordance with the news cycle – created a sense of continuity: even radical events did not

appear as definitive breaks with the past. Here the profound social need for existential, rather than merely administrative, order becomes apparent: people seek not only regulations and procedures, but the feeling that history possesses "form" and "meaning," that it does not disintegrate into chaotic fragments (Halbwachs, 1992; Connerton, 1989).

Against this background, the almost complete absence in collective memory of references to her concrete political decisions or positions becomes indicative. Such absence does not testify to indifference or weakness. Let us note the factual dimension of monarchical service: according to officially disseminated calculations, by the end of her reign Elizabeth II had undertaken more than 21,000 official public engagements within the United Kingdom, conducted over 1,100 weekly audiences with prime ministers, and received the credentials of more than a thousand diplomats (The Royal Family. "Annus horribilis" speech, 24 November 1992). These figures underscore the scale of the routine component of monarchical presence, which often remains beyond the limits of public perception. The shift of emphasis in the collective perception of the Queen's image therefore points to a different type of authority, one that does not require political articulation: routine activity remains in the background, while the "tone" and "measure" of presence move to the foreground (Connerton, 1989; Halbwachs, 1992).

It is well known that Elizabeth II maintained distance from ongoing conflicts – and it was precisely this distance that enabled the preservation of trust under conditions of constant political polarization. Her "power" in mass perception appears not as an instrument of influence, but as a form of responsibility for the tone and boundaries of public life (Halbwachs, 1992).

This becomes particularly evident in those moments when the Queen did speak – yet spoke rarely, deliberately, and with a precise sense of limit. Instead of daily participation in political commentary, she chose strategically significant points within ritual time. Thus, in 1992, in a speech marking the fortieth anniversary of her Accession, she described that year as an "annus horribilis." What is important is that this sounded neither as an affective reaction nor as a "justification," but as a maximally restrained acknowledgment of crisis – a brief phrase that paradoxically restored a sense of reality and proportion. This gesture demonstrates that even within public discourse a monarch may and should function not as a "commentator," but as a marker of limit – one who does not amplify drama, but attests to its existence.

A similar approach was manifested in her reaction to the death of Diana in 1997: the Queen delivered an address remembered not for its political content, but for the organic manner in which the roles of sovereign, mother, and grandmother were combined. (The Royal Family, 1997). She did not appropriate collective grief, nor did she transform it into a stage for self-presentation; rather, she marked presence and acknowledged loss. In this way, "silent strength" becomes a socio-psychological resource: society is not instructed how to experience the event, yet it is given a sign of sharedness, a minimal framework of solidarity (Assmann, 2011).

Hence the perception that her presence possessed an almost therapeutic significance. The Queen did not offer doctrines nor formulate final solutions, but provided something different – stability of conduct, predictability of gestures, restrained fidelity to form. For societies fatigued by political noise, precisely this absence of demonstrativeness proved especially persuasive: service appeared not as sacrifice or heroism, but as a natural condition – duty accepted once and for all. (Khitrova T. V., 2015).

It is equally important that this stability was not "cold." Elizabeth II's mode of service contained a human dimension, yet without crossing into public confession. Her restraint became a political virtue in an age of informational overload, when emotion is frequently deployed as a technology of influence. She was able to be present at moments of collective shock without appropriating them, and for this reason her individual gestures, brief addresses, and ritual appearances often proved more effective than lengthy speeches: they left space for shared experience without foreclosing it through interpretation (Nora, 1989).

Such a form of presence became possible not only because of personal character, but also due to a unique historical convergence of media epochs. The coronation of 2 June 1953 marked the moment when the monarchy effectively entered the era of mass visual experience: ritual ceased to belong solely to a limited circle of those physically present and was transformed into an event that could be "seen from the living room" (Thompson, 1995).

This opened a new space – one of daily observation, in which grandeur was combined with proximity, and symbol with domestic habit. Subsequently, this "domestic" presence was reinforced by regular rituals of address. It is indicative that Elizabeth II delivered her first Christmas Broadcast already in 1952 – by radio from Sandringham – continuing the tradition of her father (The Royal Family, 1952). In 1957, the Christmas format was televised for the first time, and this very change of channel became part of the image: the monarchy did not destroy form, but "relocated" it into new media – from radio to television, from television to the Internet and social platforms (The Royal Family, 1957). Over the decades, channels changed, yet the principle of ritual predictability remained unbroken.

In this manner, a long-term media narrative was formed, within which the Queen became a background figure in the everyday life of several generations. People state that they "grew up with her," and this is not merely an emotional metaphor: in many biographies Elizabeth II indeed functioned as a stable "background sign" almost everywhere – on stamps, in news reports, in annual addresses, on coins and banknotes, at state ceremonies (ABC Australia, 2015).

Thus emerged a particular type of emotional connection, combining distance and proximity without internal contradiction. The gratitude expressed after her passing was therefore gratitude not so much "for achievements" as for endurance and constancy – as a form of ethical recognition. It reflects an awareness that stability does not arise spontaneously; it requires daily – often invisible – labor to sustain meaning and form (The Royal Family, 2022). In this sense, the Queen's death became for many a symbolic end of the twentieth century – not chronologically, but existentially: the conclusion of a type of historical time in which pauses, silence, and long-formed reputations were still possible.

An additional dimension of this phenomenon concerns the sacralization of her image. Elizabeth II was known for not concealing the Christian dimension of her self-identification and for regularly speaking of faith in her Christmas messages, where Christ appeared not as a cultural marker but as a source of hope and meaning (The Royal Family, 1957).

In the secular discourse of mourning following her death, respect for her memory was often articulated in religious vocabulary, and interconfessional – even interreligious – solidarity expressed through references to the Queen's "righteousness" became a noticeable socio-cultural fact (albeit without any formal ecclesiastical procedure of canonization, particularly within the Anglican tradition).

It is also necessary to emphasize the gender dimension of the perception of the Queen's image. In mass consciousness, female rule in the British tradition is frequently associated not with expansion or the demonstration of force, but with endurance, continuity, and the capacity to sustain constancy over time. Comparisons with Queen Victoria arise almost naturally: in both cases, "greatness" is conceived as the prolonged maintenance of the integrity of the state framework. In the case of Elizabeth II, this "measure of greatness" even acquired a precise calendrical symbol: on 9 September 2015 she became the longest-reigning monarch in British history, surpassing Queen Victoria. Significantly, according to the official position, this record was to pass without celebration – once again underscoring the dominance of the principle of service over that of triumph (GOV.UK, HM, 2015).

At the same time, the phenomenon of global memory surrounding Elizabeth II cannot be explained without analyzing the rituals of collective solidarity at the end of her life. Her funeral and the preceding events fulfilled the function of a global "rite of passage": millions of people synchronously experienced loss, and disciplined, voluntary participation in ritual constitutes a social fact (Assmann, 2011).

A symbol of this was the queue to Westminster Hall during the lying-in-state: official estimates announced by government representatives indicated approximately 250,000 individuals who attended the farewell ceremony (Reuters, 2022).

Even if, in twenty-first-century culture, rituals are often perceived as "form without content," this example demonstrated the opposite: ritual can function as an emotional bond of community (Assmann, 2011) when at its center stands a figure capable of embodying a meta-role (Blain N., O'Donnell H. 2013).

Ultimately, the digital age has set limits to the type of power-as-presence embodied by Elizabeth II. The contemporary media cycle demands constant reaction, and silence is frequently interpreted as the absence of position. Scandalization, digital archives, and continuous commentary in media and online transform any public figure into an object of daily evaluation: reputation in such a discourse is shaped not over decades, but by news cycles. In this sense, the Queen was "incompatible" with the logic of immediacy – and precisely for this reason her image acquires the features of a completed historical type.

It is indicative that even in the twenty-first century, when media demanded emotional demonstrativeness, the Queen preserved her manner of "restrained speech" at exceptional moments. Thus, on 5 April 2020, she delivered a rare special address to the United Kingdom and the Commonwealth in connection with the COVID-19 pandemic, concluding with the phrase "we will meet again" – a promise of the return of "better days" within a shared horizon of experience (The Royal Family, 2020).

Here once again the same logic is evident: what dominates is not doctrine nor management, but the maintenance of a framework of hope and endurance.

For a deeper understanding of the symbolic scale of Elizabeth II's figure, it is also appropriate to consider her within a broader context of long-term moral authority formed beyond the boundaries of ordinary political activity. This does not imply direct parallels, but rather a comparison of types of leadership that influence society through ethical presence and duration of service. In this sense, the example of Pope John Paul II is illustrative as a figure whose moral authority far exceeded confessional boundaries; in the political dimension, Nelson Mandela stands as a symbol of reconciliation; in the spiritual dimension, the Fourteenth Dalai Lama represents a leader whose influence is primarily ethical. Alongside them, Elizabeth II delineates a distinct type of suprapolitical meta-authority: not reformist, not prophetic, but "framework-oriented" – one that sustains the possibility of dignified movement without the loss of measure.

Conclusions. In public discourse, the Queen increasingly appears not as a monarch with defined functions, but as a benchmark of what power preserving dignity over time may look like. After her death, the monarchy retained formal rituals and procedural correctness, yet lost the gravitational center of presence. For this reason, memory of Elizabeth II belongs not only to history in a narrow sense, but also to the sphere of symbolic anthropology and memory studies: she becomes an image of dignified old age, of dignified completion, a type of presence that helps explain why societies are capable of enduring turbulence without internal disintegration.

At the same time, the proposed interpretation does not claim to provide an exhaustive explanation of the phenomenon; rather, it outlines an analytical perspective for further interdisciplinary research into symbolic leadership under conditions of a mediatized society (The Royal Family, 2022).

The prospects for further research logically follow from this conclusion. First, a comparative analysis of symbolic leadership in different political and cultural contexts appears promising. Second, particular attention should be devoted to the transformation of monarchy under conditions of digital media and new forms of public communication, where symbolic distance has little space to exist. Third, an important direction concerns the study of generational memory: differences in the perception of the Queen among various age groups and media generations. No less promising is the analysis of contemporary state rituals and their role in constructing political community.

Thus, memory of Elizabeth II emerges not merely as an object of historical reflection, but as a key to understanding the transformations of power, authority, and historical time in the twenty-first century. It is precisely in this that its enduring scholarly relevance resides.

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DOI https://doi.org/10.30525/2592-8813-2026-2-48

GLOBAL PROBLEMS AND INTERNATIONAL YOUTH POLICY IN AZERBAIJAN

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Abstract. Globalization, considered an irresistible process, is rapidly changing the world's political, economic, social, and environmental landscape and transforming the international system from a functional and institutional perspective. These processes are also characterized by an expanding range of problems. Progressive humanity is seeking rational solutions to existing problems, employing various mechanisms and instruments to this end, and putting forward concrete plans. One example is "Transforming our world: the 2030 Agenda for Sustainable Development", presented by the UN in 2015. Youth is the most vulnerable segment of the population, exposed to the impact of global problems. This impact is most clearly manifested in the areas of healthcare, education, and employment.

Key words: global issues, youth policy, youth health, youth education, youth employment.

Introduction. Ensuring the interests, development and safety of youth in the new realities created by globalization and digitalization, and, in turn, unlocking their potential requires improving the institutional foundations of international youth policy. Currently, such non-governmental organizations as the United Nations Office for Youth Affairs, the Council of Europe Department for Youth Affairs, the Committee for Monitoring Intergovernmental Cooperation in the Field of Youth of the Council of Europe, the European Youth Foundation, the Youth Forum of the Islamic Conference on Dialogue and Cooperation, and the Council of the CIS Member States for Youth Affairs and others, as well as the Association of Students studying Economics and Business, the European Association of Law Students, the International Youth Chamber, The International Federation of Medical Students Associations, the World Scout Movement, Youth for Mutual Understanding, and others.

The establishment of the position of UN Assistant Secretary-General for Youth Affairs also proves that youth policy is at the center of the international agenda. In December 2023, Uruguayan Felipe Polye became the first person appointed to this position.

The Republic of Azerbaijan, as a member of the international community, participates both in international youth policy and in the implementation of systematic and targeted measures related to youth at the national level. The main goal of the state youth policy implemented in the republic is the physical, mental and spiritual development of the younger generation, the expansion of their capabilities and skills, the solution of their problems and the protection of their rights. At the same time, expanding the international representation and connections of young people and creating conditions for them to make themselves known on the international stage are among the priorities of this policy.

In the Law "On Youth Policy", adopted in 2002 and amended in subsequent years in accordance with the general trends and development processes taking place in the republic and the world (Azərbaycan Respublikası. Gənclər siyasəti haqqında Azərbaycan Respublikasının qanunu), the participation of Azerbaijani youth in international events and the creation of opportunities and conditions for the development of relations with Azerbaijani youth living abroad are among the tasks that the state must fulfill. In addition, it is planned to use the opportunities of the Youth Foundation of the Republic of Azerbaijan to strengthen peace, cooperation and mutual understanding in the world, as well as to stimulate activities related to youth policy in the social and humanitarian fields, especially in the fields of science, education and culture, and the State undertakes to support the activities of this Foundation.

Since 2005, state programs called "Azerbaijani Youth" have been implemented in the republic at the expense of state funds. Along with youth development, healthcare, integration into society, unlocking its potential and other important issues, these programs also focus on expanding its international relations in the context of the rapid development of globalization and the information society.

The purpose of this article is to analyze the impact of global problems caused by the processes of globalization on the situation of youth, as well as to explore the features and priorities of the state youth policy in Azerbaijan in the fields of health, education and employment, taking into account the objectives formulated within the framework of the 2030 Agenda for Sustainable Development.

Discussion. In 2005-2021, three government programs related to youth policy were implemented: "The State Program for the Youth of Azerbaijan (2005–2009)" (Azərbaycan Respublikası Prezidenti. Azərbaycan Gəncliyi Dövlət Proqramı (2005–2009-cu illər), 2005, pp. 2343–2360), "The Youth of Azerbaijan in 2011-2015" (Azərbaycan Respublikası Prezidenti. Azərbaycan gəncliyi 2011–2015-ci illərdə dövlət proqramı, 2011, pp. 1524-1536) and "The Youth of Azerbaijan in 2017–2021" (Azərbaycan Respublikası. Azərbaycan gəncliyi 2017–2021-ci illərdə dövlət proqramı, 2017). Within the framework of these programs, the following areas of activity were identified: strengthening the international relations of Azerbaijani youth, expanding its representation in international youth organizations, expanding the participation of Azerbaijani youth in youth programs of international and regional organizations, popularizing Azerbaijan, its historical and national cultural heritage abroad, studying the world experience of working with youth, exchanging experiences in in this area, the development of friendly and cooperative relations between Azerbaijani youth and the youth of the world, as well as raising awareness among young people about environmental protection.

Identifying the essence of global challenges, predicting their possible consequences and taking preventive measures to prevent them is an extremely important issue from the point of view of ensuring the national security of the state and requires a strategic approach. The implementation of the "Strategy for the Development of Azerbaijani Youth for 2015–2025" (Azərbaycan Respublikası Prezidenti. 2015–2025-ci illərdə Azərbaycan gənclərinin inkişaf strategiyası, 2015, pp. 90–98) is aimed at developing the potential of the republic's youth in accordance with the requirements of the time and forming an active civic position among them. The organization of forums where youth issues are discussed, increasing their knowledge, skills and initiatives, expanding their representation in government bodies, non-governmental organizations, international structures, expanding their relationships with Azerbaijani youth living abroad, etc. were identified as means of achieving these goals.

In order to implement the 2030 Agenda for Sustainable Development at the national level, the National Coordinating Council for Sustainable Development was established in Azerbaijan in 2016. In addition, five national priorities were identified that should be implemented in the field of socio-economic development of the country by 2030: 1) a steadily growing competitive economy; 2) a dynamic, inclusive and socially just society; 3) competitive human capital and a center for modern innovation; 4) large-scale return to the liberated territories and 5) a country with a clean environment and "green growth" (Azərbaycan Respublikası. Azərbaycan 2030: Sosial-iqtisadi inkişafa dair milli prioritetlər, 2021).

In Azerbaijan, young people involved in the implementation of both the 2030 Agenda for Sustainable Development and national priorities put forward various innovative proposals, participate as volunteers in the implementation of socio-economic and environmental projects, and conduct youth education activities. At the beginning of 2025, the population of Azerbaijan was 10,224.9 thousand people, including 2,300.8 thousand people aged 14-29 years, that is, young people. Thus, 22.5% of the country's population were young people, of whom 52.4% were men and 47.6% were women (Azərbaycan Respublikası Dövlət Statistika Komitəsi. Azərbaycan gəncləri: Statistik məcmuə, 2025, pp. 19, 21). As can be seen from the statistics, more than a quarter of the population is young people, which means that the younger generation is the main driving force in the implementation of both domestic and foreign policy of the republic.

Since 2005, state programs called "Azerbaijani Youth" have been implemented in the republic at the expense of state funds. Along with youth development, healthcare, integration into society, unlocking its potential and other important issues, these programs also focus on expanding its international relations in the context of the rapid development of globalization and the information society.

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The rapid increase in the number of young people with mental and behavioral disorders is particularly concerning. In 2015, 2,584 people in this category were registered in Azerbaijan, while in 2024, this number increased to 7,100. In 2015, there were 9.7 patients per 10,000 young people aged 14–29, while in 2024, this number increased to 30.9 (Azərbaycan Respublikası Dövlət Statistika Komitəsi,

2025, pp. 107–108). Thus, from 2015 to 2024, the number of young people with mental and behavioral disorders increased by 2.7 times, while the number of patients per 10,000 people increased by 3.1 times.

Alcoholism and drug addiction are also among the diseases observed among young people. In 2015, 41 young people were diagnosed with chronic alcoholism and alcoholic psychosis for the first time in the country, while drug addiction and toxic substance abuse were diagnosed in 520, while in 2024, these numbers were 32 and 1,499, respectively. For every 100,000 young people, the incidence of chronic alcoholism and alcoholic psychosis was 1.5 in 2015 and 1,499 in 2024, while the incidence of drug addiction and toxic substance abuse was 19.5 and 65.1, respectively (Azərbaycan Respublikası Dövlət Statistika Komitəsi, 2025, p. 113).

In Azerbaijan, alongside domestic measures, protecting the health of the younger generation is also implemented within the framework of international youth policy. In agreements signed by the Ministry of Youth and Sports of the Republic of Azerbaijan with relevant organizations in foreign countries, the issue of protecting the health of young people was identified as one of the main areas of cooperation. Azerbaijan's cooperation with the World Health Organization and the projects it implements are also of great importance in terms of protecting the health of the population, including youth. The WHO is implementing projects in the country such as the Mental Health Program, DOT (short-course treatment for tuberculosis), MECACAR (polio eradication program), and the diphtheria control program, among others (Azərbaycan Respublikası Xarici İşlər Nazirliyi. Azərbaycan Respublikası və Ümumdünya Səhiyyə Təşkilatı).

The Public Union of Doctors and Medical Students, established in Azerbaijan in 2007 to promote the development of healthcare and medical science, is represented in the International Federation of Medical Students' Associations. Membership in the Federation creates conditions for the participation of Azerbaijani youth in international exchange programs in the field of medicine (AzerMDS. Mübadilə proqramı).

The global crisis in the education sector is one of the most serious challenges of our time. It is important to remember that the educational process directly affects the younger generation, and any positive or negative event or result achieved in this area has a significant impact on the development of young people, their place and status in society, and their overall destiny. Despite some positive trends observed in current global education averages, challenges still remain.

One of the main causes of the global education crisis is limited access to education. According to projections, by 2030, approximately 84 million children worldwide will be out of school. At the same time, there are problems with the quality of education. For example, in sub-Saharan Africa, approximately 70% of ten-year-olds cannot read a simple text. Furthermore, education funding does not meet the required level. About $100 billion is needed annually to improve the quality of education in developing countries. A teacher shortage is also one of the causes of the crisis. Globally, there is a shortage of approximately 44 million teachers. As UN Secretary-General Antonio Guterres noted, we will not be able to build a more peaceful, sustainable, and equitable global society without a fundamental change in the global community's attitude towards education. According to data contained in the UNESCO Global Education Monitoring Report 2026, by 2024, 1.4 billion children in schools worldwide will be out of school. There were 327 million people enrolled in education in the country, a 30% increase since 2000. The number of out-of-school adolescents and young adults decreased by 33% from 2000 to 2015, but increased by 3% from 2015 to 2024. In 2024, 273 million people remained out of school (UNESCO. Global education monitoring report 2026: Access and equity – Countdown to 2030, 2026, p. XXII).

The development of education in Azerbaijan, the universal inclusion of youth in education, and the expansion of international ties in the field of education are among the key components of state policy. The targeted policy pursued in the field of education is already attracting attention with its positive results.

The country is seeing positive trends in youth engagement in education. In 2009, for every 1,000 young people aged 14-29 in Azerbaijan, 710 had higher, specialized, vocational, or complete secondary education. Ten years later, in 2019, this figure was 744 (Azərbaycan Respublikası Dövlət Statistika Komitəsi, 2025, p. 122).

Creating conditions for young Azerbaijanis to study at prestigious universities abroad is one of the priorities of the republic's international youth policy. In the 2024-2025 academic year, the number of young people sent by the state to study at universities abroad was 1,111. Of these, 478 were sent to Turkey, 321 to Hungary, 198 to Russia, 72 to China, 13 to Romania, 12 to Kazakhstan, 4 to the United Kingdom, 3 to the Republic of Korea, 3 to Italy, 3 to Spain, 2 to Tajikistan, 1 to the United States, and 1 to Slovakia (BMT-nin Sivilizasiyalar Alyansının Gənclər Forumu işini başa çatdırıb, 2016, p. 125).

Issues related to improving the level of education of young people and broadening their scientific horizons are included in virtually all agreements and memoranda signed by the Ministry of Youth and Sports of the Republic of Azerbaijan with foreign partners.

In 2016, at the Youth Forum held as part of the 7th UN Alliance of Civilizations Global Forum in Baku, calls and goals related to education were also discussed (BMT-nin Sivilizasiyalar Alyansının Gənclər Forumu işini başa çatdırıb, 2016).

Azerbaijani youth have participated in the European Union's Tempus, Erasmus Mundis, Jeanne Monnet, and other projects. The Republic participates in the Erasmus+ program as a partner country, and a National Erasmus+ Office has been established in Baku to facilitate its implementation. Furthermore, since 2019, the Erasmus Student Network – Azerbaijan has been operating in Azerbaijan, helping young people study abroad through Erasmus+ programs.

Relations between Azerbaijan and international non-governmental organizations working in science and education are also developing. The republic's educational institutions participate in projects with international organizations such as the Association of Students Studying Economics and Business, Students of Free Enterprise, the Union of Young Researchers of the Turkic World, the European Law Students' Association, and others.

Among today's global challenges, unemployment and the provision of decent work deserve special mention. The main causes of unemployment include economic crises and the resulting recessions, structural changes in the economy influenced by digitalization, automation, and robotics, demographic factors, and other factors. Unemployment plays a key catalytic role in the emergence of economic, social, and political contradictions in society. Compared to other segments of the global working population, young people face unemployment more frequently.

According to the International Labor Organization, the global unemployment rate in 2024–2025 was 4.9%, and the number of unemployed increased from 182.9 million to 184.2 million. The unemployment rate is projected to remain unchanged in 2026 and decline to 4.8% in 2027 (International Labour Organization, 2026, p. 7). While these statistics indicate a satisfactory quantitative situation, they do not reflect qualitative indicators. A certain portion of the employed population works in difficult, low-quality conditions and receives very low incomes. For example, in 2025, 284 million workers worldwide lived in poverty, earning less than $3 a day. In addition, 2.1 billion people, or 57.7% of all workers, worked informally (International Labour Organization, 2026, p. 1). This situation creates serious problems for the social security of these people working without an employment contract.

The global youth unemployment rate was approximately 2.5 times higher than the global average. In 2024, 12.3% of youth (66.2 million people) and 12.4% (67.3 million people) were unable to find work. It is expected that 67.5 million people will be unable to enter the labour market in 2026 and 68 million in 2027. Along with unemployment, the number of young people excluded from vocational training continues to grow. In 2025, there were 257 million young people worldwide who were not in employment, education, or training, accounting for 20% of the total youth population. In 2023, this figure was 19.7% (International Labour Organization, 2026, pp. 6–7). Based on statistical data,

it can be noted that barriers and inequalities exist in youth access to the labour market, and they are subject to discrimination.

Employment rates in Azerbaijan are not significantly different from global averages. In 2024, the total working-age population of the republic was 5,312,100, with 5,029,800 employed and 282,300 unemployed. This means that 94.7% of the working-age population was employed and 5.3% was unemployed. Regarding youth, in 2024, of the 1,297,600 young people of working age (15-29 years) in Azerbaijan, 1,179,500, or 90.9%, were employed and 118,100, or 9.1%, were unemployed. 58,100 people, or 49.2%, were men, and 60,000 people, or 50.8%, were women (Azərbaycan Respublikası Dövlət Statistika Komitəsi, 2025, pp. 133, 137).

Ensuring youth employment is one of the priority areas of Azerbaijan's international youth policy. Partnerships have been established in this area with the UN, the World Bank, the European Union, the International Labour Organization, and other relevant international organizations.

In 1995, the UN General Assembly adopted the "World Programme of Action for Youth to the Year 2000 and Beyond" (United Nations General Assembly. World programme of action for youth to the year 2000 and beyond (A/RES/50/81), 1995). One of the 10 areas of action defined in the program is related to youth employment. Azerbaijan participates in the implementation of this program, and the necessary steps are being taken at the national and state levels to ensure youth employment. The Norwegian SYSLAB centers established by the Ministry of Labor and Social Protection of the Population of the Republic of Azerbaijan and the UNDP in Baku, Sumgayit, Ganja, Masalli and Zagatala have helped integrate young people into the labor market. The main goal of the project "Creating Inclusive and Decent Jobs for Socially Vulnerable Groups" in the country, with the participation of UNDP, is to promote the employment of people with disabilities. Pilot projects "Supporting the Employment of Young People with Higher Education, First-Time Job Seekers" and "Youth Employment Subsidy Program" were implemented in Baku and Goychay with the assistance of the International Labor Organization (Azərbaycan gənclərin məşğulluğunun dəstəklənməsində çox ölkələrə nümunədir).

Cooperation between the International Labor Organization and Azerbaijan also includes the implementation of joint measures to create decent working conditions, protect workers' rights, and ensure their social protection. This is evidenced by the signing of the "Decent Work Country Program for 2025–2029" between Azerbaijan and the International Labor Organization on November 25, 2025 (Azərbaycan Respublikası Əmək və Əhalinin Sosial Müdafiəsi Nazirliyi).

Conclusion. Based on the above, it can be concluded that in today's globalized world, overall development is accompanied by the emergence of various problems. In addition to uniting international efforts to address existing challenges, it is important to take the necessary steps at the national level. Azerbaijan places particular emphasis on addressing issues related to the health, education, and employment of the younger generation in its international youth policy, employing various mechanisms to achieve this goal and achieving positive results.

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DOI https://doi.org/10.30525/2592-8813-2026-2-49

THE HISTORY OF ARCHAEOLOGICAL RESEARCH OF AZERBAIJAN'S ARAZ RIVERSIDE MONUMENTS

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Abstract. Archaeological investigations conducted in the ancient settlements of Nakhchivan, Karabakh, and Eastern Zangezur have revealed numerous examples of material culture belonging to the Bronze Age, Early Iron Age, Antique, and Medieval periods. In the Islamic-period monuments of Azerbaijan, formed under the influence of shared material cultures during the 11th–12th centuries, common characteristics of the Nakhchivan, Karabakh, and Tabriz architectural styles, influenced by Arran architecture and the Central Asian architectural school, have been observed in the remains of religious buildings. Ceramic samples and architectural remains uncovered during archaeological excavations have provided a clear understanding of the culture and daily life of the population living along the Araz River. Archaeological studies emphasize the importance of Nakhchivan, located at the intersection of caravan routes that became one of the main economic centers of trade with the Near and Middle East, as well as the "Khudafarin" bridges built over the Araz River. Field research and archaeological excavations carried out in the 1960s–1970s proved the strategic and commercial significance of the "Khudafarin" bridges and the surrounding areas of Karabakh and Eastern Zangezur, including settlements, ancient cities, fortresses, watchtowers, and urban-type settlements belonging to the Bronze, Early Iron, Antique, and Medieval periods.

Key words: archaeology, Nakhchivan, Araz River, medieval period, Khudafarin Bridge, fortress, Zangilan.

Introduction. One of the pressing issues in the history and archaeology of Azerbaijan is the study of the transitional stage from ancient cities to medieval urban centers. The main stage of archaeological research on medieval cities began in the early twentieth century. In 1923, the Archaeological Committee for the Study of Azerbaijan was established. The Committee's activities included the registration, protection, and scientific investigation of historical monuments. As a scientific research institution, the Society for the Study and Investigation of Azerbaijan conducted archaeological excavations and field surveys (Archaeology of Azerbaijan, 2008, Vol. VI).

During the second half of the nineteenth century and the beginning of the twentieth century, the growing interest of Russian and Western European scholars in Azerbaijan led to reconnaissance-type investigations at several archaeological sites. In particular, exploratory research in the monuments of Nakhchivan was carried out by N.V. Khanikov in 1852 at the ancient urban ruins of Kharaba-Gilan and several epigraphic monuments in the region. He examined the city ruins and provided information about a stone inscription dated to the Hijri year 712. In 1879, I.S. Polyakov also conducted archaeological investigations in Nakhchivan (Dostiyev T.M., 2016, pp. 12–13).

Beginning from the early twentieth century, with the establishment of local scientific societies and committees and the involvement of Azerbaijani archaeologists in field research, settlements, burial monuments, and religious structures belonging to various periods from the Early Bronze Age to the Late Middle Ages were discovered and investigated. The archaeological materials obtained created a clear picture of the people's daily life and cultural development. Among the researchers who made invaluable contributions to the study of the monuments of Nakhchivan and the Araz River basin were Ə. Ələkbərov, O.H. Həbibullayev, V.H. Əliyev, V.H. Baxşəliyev, A.Q. Seyidov, B.İ. İbrahimli, Ə.İ. Novruzlu, and others (Archaeology of Azerbaijan, 2008, Vol. VI).

In the middle and second half of the twentieth century, special attention was paid to the archaeological and theoretical study of settlements located in the Araz riverside plains and around the Khudafarin bridges built across the Araz River. In particular, R.B. Göyüşov, Q.M. Ahmadov, A.B. Nuriyev, and Ə.R. Salamzade conducted important research, while in the second decade of the twenty-first century A.M. Mammadov, T.M. Dostiyev, and others continued archaeological excavations and field investigations in these territories.

Discussion. The Araz riverside plains extend along the Araz River and cover the territories of the Sadarak, Sharur, Babek, Julfa, and Ordubad districts of the Nakhchivan Autonomous Republic. In connection with the construction of hydroelectric power stations on the Araz River, archaeological excavations were carried out during the late 1960s and 1970s in medieval urban settlements, including Kharabashahar, Astabad, and Sharifan. These studies played a significant role in the investigation of Azerbaijani cities and urban culture of the thirteenth–seventeenth centuries.

In order to investigate archaeological monuments threatened by flooding, a complex expedition consisting of three groups was established in 1968. The expedition studied the sites of Kharabashahar, Astabad, Bulgan, Garachug, Gizilburun, Garakhanbayli, Boyukduz, and Shahtakhti, which were at risk of remaining under water. As a result of research conducted on the architectural remains near the village of Garachug, located 8 km south of Nakhchivan, residential houses and rich evidence related to the economic life and culture of the late medieval period (14th–17th centuries) were discovered.

The expedition also carried out investigations at the settlement of II Kultapa, where fortress wall foundations, architectural remains, plain and painted ceramics, and bone tools belonging to the cultural layer of the early second–first millennia BCE were uncovered (Nakhchivan Encyclopedia, 2022, pp. 27–28).

Archaeological Research Conducted in the 1960s–1970s

Kharaba-Gilan is located in the territory of Aza village of the Ordubad district, on the bank of the Gilan River. Possessing defensive fortifications and a well-developed water supply system, this settlement was known in the Middle Ages as Kiran and among the local population as Kharaba-Gilan. Situated between Tabriz and Beylagan, Kharaba-Gilan consisted of three parts: the citadel (narinqala), shahristan, and rabat. In 1975, archaeological excavations were carried out at the ancient city site of Kharaba-Gilan with the joint participation of Q.M. Aslanov and B.I. Ibrahimli. Founded during the Antique period in the 3rd–4th centuries, the city later became one of Azerbaijan's major centers of trade and craftsmanship during the Middle Ages. Numerous metal objects dating to this period were discovered there.

Reflecting the characteristic features of the Nakhchivan architectural school, archaeological excavations conducted under the leadership of B.I. Ibrahimli in the shahristan area of Kharaba-Gilan revealed residential houses, large public buildings such as caravanserais and bathhouses, a mill site, and religious structures including the remains of mosques and mausoleums. The residential buildings of Kiran were constructed of mud brick on stone foundations. Imported ceramic wares, ornamented faience vessels, and numerous foreign coins discovered during the excavations testify not only to the development of craftsmanship and trade but also to the extensive international trade relations of the medieval city of Kiran (Dostiyev T.M., 2016, pp. 21, 36–37).

In 1959, during archaeological excavations at Kultapa, O.H. Habibullayev discovered the remains of a Chalcolithic settlement in Azerbaijan and throughout the South Caucasus. These circular structures, built of mud brick and adobe, are considered among the oldest houses discovered in the territory of Azerbaijan (Habibullayev O.H., 1959). In 1969, the remains of a large Bronze Age settlement were discovered at Gizil Vang. The initial investigation of the II Kultapa monument is also associated with the name of O. Habibullayev.

In the 1970s, due to the construction of the Khudafarin reservoir, expeditions were organized in order to prevent the flooding of monuments located in the surrounding territories. The "Khudafarin

Expedition" aimed to determine the role of the Khudafarin bridges in the medieval economy of Azerbaijan. For this purpose, sections of two major ancient caravan trade routes coming from the south and passing through Ardabil, Barda, Nakhchivan, and Hunan were traced, and relevant materials were collected. Research conducted in the territories along the Araz and Hekeri (Akari) rivers within the modern Jabrayil and Zangilan districts proved that these regions historically possessed fertile lands and favorable natural-geographical conditions.

From the perspective of studying the culture of artificial irrigation farming, the famous Gavur Arkh canal, drawn from the Araz River during the Middle Ages, played a significant role in the economic development of the Mil plain (Goyushov R.B., Nuriyev A.B., 1974, p. 2). Medieval historians and travelers also referred to the "eleven-span" and "fifteen-span" Khudafarin bridges in their accounts.

Comprehensive research on the Khudafarin bridges became possible in 1974, when the monument was measured and accurate architectural drawings were prepared (Salamzade Ə.R., 1979, pp. 21–22). Built approximately 800 meters apart at the narrowest point of the Araz River, these bridges represent complex engineering structures of their time. One of the bridges, constructed of white stone, consists of eleven spans. The bridge, which is 12 meters high and 130 meters long, was equipped with specially designed wave-breaking structures of various sizes adapted to the force of the river current.

The Khudafarin bridges were constructed not only on caravan and trade routes but also in a strategically advantageous military location. These bridges were situated neither directly on the Ardabil–Beylagan route nor on the Tabriz–Julfa route; rather, they were built at a crossing point bordered by the mountainous Garadagh region in the south and barren desert areas in the north, which were unfavorable for ordinary travel routes (Goyushov R.B., 1993, p. 69). After the Arab conquest of Azerbaijan, a route connecting Tabriz, Beylagan, Barda, and Tbilisi through the Garachay valley emerged, and bridges were constructed along this route (Goyushov R.B., 1993, pp. 69–70).

The second stone bridge, located further south along the lower course of the river, is 200 meters long, 4.5 meters wide, and consists of fifteen spans. Unlike the first bridge, it was constructed of baked bricks. This architectural monument dates to the thirteenth century, as confirmed by its construction techniques, brick dimensions, and foundation materials. After crossing the Khudafarin bridge toward the north, investigations along the route leading toward Ordubad revealed an Early Medieval settlement, a fortress, and an ancient city site extending as far as the modern Hekeri River. Among the local population, this fortress is known as "Tri." It was built on a high hill at the confluence of the Hekeri and Araz rivers (Goyushov R.B., 1993, pp. 69–70).

Researcher Q.M. Ahmadov notes that, in addition to its economic significance in the history of Azerbaijan, the Araz River also played an important role as a natural landmark for identifying the ruins of several ancient cities whose exact locations remain unknown, as well as for clarifying the directions of ancient trade routes passing through them. In order to maintain economic and cultural ties with the north, the population of Tabriz had to travel either through Khoy or Ardabil to cross the Araz River. Since the Khudafarin bridge was geographically closer to Tabriz, this suggests that the road coming from Ardabil passed through Khudafarin rather than Barjand, where it divided into two directions: eastward toward Beylagan and Barda, and westward toward Ordubad and Nakhchivan (Ahmadov Q.M., Ahmadov P.C., 1978, p. 4).

While describing the campaigns of the Arab commander Salman ibn Rabia during the Arab Caliphate period, when he traveled from Nakhchivan through the Bichenek pass into Arran, al-Baladhuri also mentioned Tri among the captured territories (Baladzori A., trans. from Arabic by N.K. Juze, 1927, p. 12). According to the scientific literature, such fortresses, usually built on high hills or rocky elevations due to the terrain, functioned both as shelters for the population and as observation posts. Although the "Khudafarin" archaeological expedition mainly focused on the investigation of medieval urban ruins, it also provided valuable information about surrounding monuments. The fortress itself is dated to the ninth century (Ahmadov Q.M., Ahmadov P.C., 1978, pp. 5–6).

The fortress was constructed from fragments of white limestone, river stones, and lime mortar. Wooden beams made from apjan wood were widely used in the construction process. The preserved section of the fortress wall reaches a height of 3 meters, while the wall itself is also 3 meters thick. During construction, wooden beams were placed at intervals of approximately one meter. The spaces between the beams measure between 5 and 19 cm, and the beams were laid across the width of the wall. Inside the fortress, trench-like pits measuring 3 × 5 meters were identified. It is also noted that the fortress possessed an underground passage on the side facing the Okhchu River (Ahmadov Q.M., Ahmadov P.C., 1978, pp. 6–7).

The Hajalli tower is located on the slope of a mountain near the village. The foundation and walls of the tower were built from river stones, rock fragments, and lime mortar. The structure itself was constructed of baked bricks measuring 23 × 23 × 8 cm. The entrance is located on the eastern side and has an arched form. The inner diameter of the tower measures 3.86 × 3.65 meters, while the wall thickness is 80 cm. At a height of 80 cm above the floor level, five openings measuring 20 × 25 cm were identified in the walls. A second row of larger openings, measuring 30 × 50 cm, is located closer together. One of these openings faces downstream toward Khudafarin on the Araz River, another faces upstream toward the Tri fortress, and the third overlooks a small valley descending from the mountains. These openings (loopholes or embrasures) in the fortress walls functioned as observation points. Through them, it was possible to monitor moving trade caravans and military detachments and obtain information about their movements. The impregnability of the fortress made it a reliable shelter for the local population. Nearby are also the cemeteries of Gumluakh, Hajalli, and Mammadbeyli (Ahmadov Q.M., Ahmadov P.C., 1978, p. 7).

On the right bank of the Araz River, within the territory of present-day Iran, the river flows along the base of steep rocky mountains. Therefore, transportation moving either upstream or downstream along the river was obliged to cross to the left bank in order to continue its route. The valleys of the Araz and Okhchu rivers provided favorable conditions for agriculture, animal husbandry, horticulture, gardening, and hunting. Information is also provided about the Hajalli tower, the Mammadbeyli mausoleum, and the Sharifan settlement located near the area where the Akara (Hekeri) River flows into the Araz River (Goyushov R.B., Nuriyev A.B., 1974, p. 5).

During the 1970s, archaeological excavations and reconnaissance investigations at the Sharifan settlement and surrounding territories were entrusted to the "Khudafarin Archaeological Expedition," jointly directed by R.B. Goyushov and A.B. Nuriyev in 1974 (Goyushov R.B., Nuriyev A.B., 1974). In 1978, Q.M. Ahmadov continued the excavation works.

Between 1978 and 1979, excavations were conducted in two areas of the city of Sharifan, while test excavations were carried out in six additional locations. In the northern slope of the monument, within an area of 144 m² conditionally identified as the third excavation sector, the thickness of the cultural layer was determined to be 2.75 m (Ahmadov Q.M., Ahmadov P.C., 1978, pp. 2–3).

Archaeological Research Conducted in the Second Decade of the 21st Century

After the Azerbaijani Army liberated the Karabakh and Eastern Zangezur economic regions from Armenian occupation in 2020, investigations of historical monuments were initiated within the framework of the State Return Program. In 2023, the "Eastern Zangezur Archaeological Expedition," headed by T.B. Dostiyev, was sent to the region. Studies at the Shahri-Sharifan settlement revealed a cultural layer ranging from 1.8 to 2.2 meters in thickness. Archaeologists uncovered architectural remains built from river stones, wells, protective walls constructed along ravines to prevent flood damage, production-related waste materials, and various artifacts of different functions.

Among the discoveries, glazed ceramic fragments predominated. Although preserved mainly in fragmentary form, these ceramics are distinguished by their typological richness. One of their notable local characteristics is the extensive use of cobalt-blue ornamentation on a white background in artistic decoration, reflecting the influence of Chinese porcelain and Timurid faience traditions.

Preliminary research suggests that the settlement at Sharifan emerged in the late thirteenth to early fourteenth centuries in connection with the intensive activity of the Khudafarin bridges over the Araz River (Dostiyev T.M., Aliyev T., Bashirov R., 2023, p. 90).

It should also be noted that the crypt of the Sharifan mausoleum was first registered in the 1960s and has been the subject of archaeological investigation since 1974. The construction of the mausoleum reflects the Nakhchivan architectural style and the use of baked brick masonry, while limestone typical of the Shirvan and Absheron architectural schools was also employed. The entrance and mihrab arches of the mausoleum are decorated with ornaments, whereas the remaining arches are plain. The mausoleum has a rectangular form both internally and externally. Ceramic vessels such as cups and jars were used in the upper section to fill empty spaces within the structure. The interior of the walls was filled with river stones and lime mortar, while the exterior facades were carefully hewn (Salamzade Ə.R., 1979, p. 21).

The Mammadbeyli mausoleum is located near the left bank of the Akari (Hekeri) River. Research demonstrates that the proximity of Shahri-Sharifan to the Khudafarin bridges and the trade routes passing through the region indicate the strategic transit significance of Azerbaijan's geographical position within the international trade networks connecting Europe and Asia.

The underground section of the mausoleum has a square plan with projecting corners measuring 5.4 × 5.4 meters. Three sides are covered with intersecting arches, while the fourth western side is roofed with a flat vault. In the southern wall there is a shallow niche-shaped mihrab. Its upper section is decorated with stalactite ornamentation, while the sides are adorned with slender column-like elements. The walls and arches were constructed from carefully polished stone slabs. The architectural and constructional features of the above-ground section of the monument make it possible to classify the structure among the tower-shaped mausoleums characteristic of Azerbaijani medieval architecture. The monument is dated to the late thirteenth or early fourteenth century (Salamzade Ə.R., 1979, p. 21).

It is also noted that a village bearing the same name, Sharifan, was established near the ruined city. Based on its architectural composition and construction techniques, Shahri-Sharifan is characterized by the use of baked brick masonry and by architectural features typical of the Nakhchivan–Tabriz architectural school (Salamzade Ə.R., 1958, p. 45).

In 2024, the "Eastern Zangezur Archaeological Expedition," headed by Professor Arif Mammadov, conducted archaeological investigations at the medieval urban-type settlement of Shahri-Sharifan near Sharifan village in the Zangilan district, specifically in the area known as the "Sharifan Mausoleum." The settlement covers an area of approximately 300 × 300 meters, totaling about 9 hectares. The excavation site was determined on a high hill in the northwestern part of the settlement where the Sharifan mausoleum is located. In 2024, an area measuring 15 × 10 meters (150 m²) was subjected to archaeological investigation. The monument is situated on the right bank of the Hekeri River near its confluence with the Araz River.

Preliminary archaeological research revealed ceramic materials dating to the 9th–11th, 11th–13th, and 14th–17th centuries. Among the ceramic finds were numerous monochrome and polychrome glazed vessels, as well as stone tools, osteological remains, and small fragments of glass objects. The inscription "Ali (Əli)" was identified inside one of the polychrome glazed vessels. Initial studies suggest that the Sharifan mausoleum was constructed during the 13th–14th centuries. During the excavations, an Arabic inscription and four numismatic samples were discovered above a small structure resembling a mihrab located on the southern side of the mausoleum interior, facing the qibla direction.

The mausoleum reflects architectural features characteristic of Sufi khanqahs and zawiyas of medieval Turkic-Islamic architecture. It has also been noted that the monument bears similarities to the Mirali Mausoleum, the Julfa (Nakhchivan) Mausoleum, and the Sheikh Babi Mausoleum in Fuzuli (Mammadov A.M., Aliyev T.V., Yusifova D.S., Mammadzade H.A., 2025, pp. 87–88). Archaeological excavations in the crypt of the "Sharifan" mausoleum, located within the Shahri-Sharifan settlement

first registered in the 1960s and studied since 1974, have been continuously carried out by Professor Arif Mammadov during 2024–2025.

Conclusion. In general, comprehensive investigations, analyses, and generalizations carried out throughout the history of archaeological research on these monuments demonstrate that the Araz River played a significant role in the history of Azerbaijan by helping to identify the ruins of a number of ancient urban settlements and the routes of historical trade roads passing through them. Archaeological research confirms that the historical city of Nakhchivan was situated at the intersection of caravan routes during the Middle Ages and functioned as one of the major centers of trade, craftsmanship, and culture. Urban-type settlements established at the crossings of caravan trade routes over the Araz River positively influenced economic and cultural relations within the region.

One of the medieval urban-type settlements identified through archaeological investigations is Shahri-Sharifan, located in the village of Sharifan in the Zangilan district. Archaeological research conducted at this medieval settlement proves that habitation there continued from the ninth century through the eleventh–thirteenth and fourteenth–seventeenth centuries. Due to its location near the Khudafarin bridges, caravan routes passed through the settlement and connected it with other cities of Azerbaijan through trade relations.

The functions performed by such settlements are archaeologically reflected in the dimensions of the monuments, their internal structures, and the composition of the discovered artifacts. Archaeological investigations also associate the character of the buildings, the topography and size of the site, the presence of public and religious structures, and engineering constructions such as bridges with the broader socio-economic role of the settlement. Based on the existence of archaeological features, researchers are able to determine the type of settlement represented by the site. Cities established during the Early Middle Ages were mainly fortified urban centers. Some of these small fortified towns gradually transformed during the ninth and tenth centuries into large administrative, political, commercial, craft, and cultural centers.

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THEORY AND IMPROVEMENT OF PSYCHOLOGY

DOI https://doi.org/10.30525/2592-8813-2026-2-50

PSYCHOLOGICAL CHARACTERISTICS OF THE PROFESSIONAL RESILIENCE OF PSYCHOLOGISTS IN THE SECURITY AND DEFENCE SECTOR DURING THE PERIOD OF MARTIAL LAW IN UKRAINE

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Abstract. The article examines the psychological characteristics of professional resilience among psychologists working in the security and defense sector of Ukraine under martial law conditions. The aim of the study is a theoretical and empirical analysis of resilience levels and the factors influencing its development in prolonged wartime stress conditions. The research employed a combination of methods, including literature analysis, psychodiagnostic tools measuring resilience, burnout, secondary traumatic stress, and coping strategies, as well as statistical methods. The results indicate a predominance of moderate levels of professional resilience, the presence of burnout and secondary traumatic stress symptoms, and the significant role of adaptive coping strategies in maintaining psychological stability. It is concluded that professional resilience is a dynamic, multidimensional construct requiring systematic organizational and psychological support. Future research should focus on developing and implementing resilience-building programs for professionals operating in crisis and combat-related environments.

Key words: professional resilience, psychologists, security and defense sector, martial law, resilience, burnout, secondary traumatic stress.

Introduction. The state of martial law in Ukraine, which has been in place since 2022, has led to a radical transformation in the functioning of all components of the security and defence sector. Under these conditions, the workload has increased significantly not only for military personnel and operational staff, but also for psychological service specialists who provide psychoprophylactic, diagnostic and corrective work with various categories of individuals in crisis situations. Psychologists in the security and defence sector perform functions that combine professional assistance, crisis counselling, work on combat-related psychological trauma, as well as support for personnel in conditions of constant threat to life and high-intensity combat operations.

This professional activity takes place under conditions of chronic stress, characterised by the prolonged impact of psychotraumatic factors, a high level of uncertainty, a lack of time to restore mental resources, and the constant need to make critical decisions in crisis situations. Under such conditions, there is an increased risk of developing emotional burnout, secondary traumatisation, and depressive and anxiety disorders, which directly affects the effectiveness of psychologists' professional work.

In the academic literature, the concept of professional resilience is regarded as an integrative personality trait that enables individuals to function effectively under stressful conditions, adapt to change, and restore psychological equilibrium following exposure to adverse factors (Ihnatiuk, 2025). According to the approaches of contemporary researchers, professional resilience comprises a complex of interrelated components: cognitive (assessment of the situation, flexibility of thinking), emotional (self-regulation, resistance to affective stress), behavioural (coping strategies) and motivational (value orientations and professional identity).

In international research over recent decades, resilience has been viewed as a dynamic process shaped by individual, organisational and social factors. In particular, the role of social support, the professional environment and organisational culture in fostering stress resilience is emphasised. At the same time, most academic works focus on general models of stress resilience among members of the 'helping professions', such as psychologists, social workers and medical professionals, without sufficiently taking into account the specific nature of their work in conditions of war or armed conflict (Harbuzova et al., 2024).

Particular attention should be paid to researching the psychological resilience of professionals working within the security and defence sector, as their professional activities involve a dual burden. On the one hand, they provide support to others who have experienced traumatic events; on the other, they themselves are constantly exposed to traumatic narratives, which increases the risk of secondary traumatisation. Secondary traumatisation is defined as a state of emotional and cognitive exhaustion arising from empathic immersion in the traumatic experiences of others (Pavlovska-Kravchuk & Yehonska-Spenser, 2026).

An additional complicating factor is the specific nature of the organisational environment in the security and defence sector, which is characterised by a high level of regulation, hierarchical management, the need to maintain professional discipline, and limited opportunities for psychological recovery. Taken together, this creates conditions under which the professional resilience of psychologists becomes a critically important factor not only for their personal functioning but also for the effectiveness of the entire psychological support system (Onyshchuk, 2025).

At the current stage of development in psychological science and practice, there is a clearly defined research problem concerning the insufficient theoretical and empirical study of the mechanisms underlying the formation, maintenance and development of professional resilience among psychologists in the security and defence sector under conditions of prolonged martial law. This necessitates further systematic research into this phenomenon, taking into account both individual-psychological and organisational-social factors.

In contemporary psychological science, the concept of professional resilience is considered within the framework of several interrelated theoretical approaches, the most widespread of which are the resource-based approach, the transactional model of stress, and the concept of resilience as a dynamic process of adaptation. Within the resource-based approach, professional resilience is interpreted as a combination of an individual's internal and external resources that enable the effective management of stressful situations and the maintenance of professional effectiveness even under prolonged stress (Overchuk, 2022).

The transactional model of stress, proposed in classical studies of stress psychology, focuses on the process of cognitive assessment of a situation and the coping strategies an individual employs to overcome stressors. In this context, the professional resilience of psychologists is viewed as the result of the interaction between individual personality characteristics and the demands of the professional environment (Kovalenko & Kaliuha, 2025). It is important to emphasise that the effectiveness of adaptation depends to a large extent on an individual's capacity for cognitive flexibility, emotional regulation and the use of adaptive coping strategies.

Within the framework of the concept of resilience as a dynamic process, it is emphasised that resilience is not a static characteristic, but is shaped and altered by life experiences, the professional environment and social support. Researchers note that factors such as support from colleagues, the quality of the organisational climate, the presence of a supervision system, and access to psychological support for the professionals themselves play a key role in the development of resilience (Kokun, 2025).

Recent research has focused particularly on analysing the professional resilience of those working in the helping professions, which include psychologists, psychotherapists, social workers and medical counsellors (Kokun, 2025). In these professional groups, a high level of emotional involvement

in clients' problems is combined with the need to maintain professional distance, which creates an internal conflict and increases the risk of emotional burnout.

In the context of martial law, researchers highlight the phenomenon of secondary traumatisation, which is one of the key factors contributing to a decline in the professional resilience of psychologists. Secondary traumatisation arises as a result of prolonged exposure to descriptions or manifestations of clients' primary trauma and is accompanied by symptoms of emotional exhaustion, reduced empathic sensitivity and cognitive overload (Tarasenko & Assonov, 2024). The conditions of war significantly intensify this process due to the mass nature of traumatic events and their intensity.

An analysis of international research indicates that, although the issue of professional resilience among psychologists is being actively studied in various countries, the specific nature of the work carried out by specialists in the security and defence sector in the context of full-scale war remains under-researched. Most existing academic works focus on peacetime or post-conflict conditions, whereas a situation of prolonged active armed conflict presents qualitatively different psychological challenges.

An analysis of the scientific literature reveals a research gap, namely the insufficient exploration of the psychological characteristics of professional resilience among psychologists in Ukraine's security and defence sector under martial law. This necessitates an empirical study aimed at identifying the key factors influencing the development and maintenance of professional resilience within this professional group.

Main text. Within the scope of this study, the psychological characteristics of professional resilience among psychologists in Ukraine's security and defence sector are examined as a multidimensional phenomenon comprising cognitive, emotional, behavioural and organisational components that enable professionals to function effectively under conditions of prolonged military stress. Given the specific nature of professional activity under martial law, the research objective is to identify the level of professional resilience among psychologists, determine the key psychological factors in its formation, and analyse the influence of the professional environment on its development.

Contemporary research emphasises that professional resilience is not merely an individual characteristic, but also the result of the interaction between personal resources and the external conditions of professional activity (Lazos, 2022). In this context, the aim of the study aligns with these objectives and is directed towards a systematic examination of this phenomenon under conditions of actual military stress.

The aim of this study is to identify the psychological characteristics of professional resilience among psychologists working in Ukraine's security and defence sector, and to conduct an empirical analysis of the factors influencing its development and maintenance.

Research objectives:

– to analyse contemporary English-language and Ukrainian academic approaches to the concepts of resilience and professional resilience;

– to determine the level of professional resilience in a sample of psychologists in the security and defence sector;

– to investigate the relationship between professional resilience, emotional burnout and secondary traumatisation;

– to analyse the role of coping strategies in maintaining professional stability;

– to formulate practical recommendations for enhancing professional resilience.

The empirical basis of the study consisted of psychologists working within the security and defence sector of Ukraine (military psychologists, support unit psychologists, and crisis psychologists). The sample included specialists with varying lengths of professional experience, which allowed for the consideration of age and professional experience differences in the development of resilience.

Sample size (approximate): 80–120 individuals, which meets the requirements for primary statistical analysis in socio-psychological research.

The study utilised a set of complementary methods:

1. Theoretical methods:

– analysis and synthesis of scientific literature (Ukrainian and English-language sources);

– comparative analysis of resilience concepts;

– generalisation of existing models of professional resilience.

2. Empirical methods:

– psychodiagnostic testing;

– professional resilience questionnaire (adapted resilience scales);

– motional burnout scale (Maslach Burnout Inventory);

– Secondary Traumatic Stress Scale;

– Brief COPE questionnaire.

3. Statistical methods:

– correlation analysis (Pearson/Spearman);

– comparative analysis of groups (t-test, ANOVA);

– descriptive statistics to determine mean values and the distribution of professional resilience levels.

The methodological approaches of the study are based on:

– a systems approach (viewing professional resilience as a multi-level system);

– an activity-based approach (analysing resilience in the context of professional activity);

– the transactional model of stress by Lazarus & Folkman (1984), which emphasises the role of cognitive assessment of stress and coping;

– contemporary models of resilience as a dynamic process of adaptation (Connor & Davidson, 2003).

Thus, the methodological basis of the study enables a comprehensive analysis of professional resilience among psychologists in the specific conditions of martial law and yields valid results regarding the key factors influencing its development.

In contemporary psychological science, professional resilience is viewed as an integrative phenomenon that combines an individual's ability to maintain effectiveness, psychological equilibrium and adaptability in response to prolonged stressors. In the context of helping professions, particularly psychologists in the security and defence sector, this phenomenon takes on particular complexity due to the combination of high emotional strain and constant exposure to the traumatic experiences of others (Pavlovska-Kravchuk & Yehonska-Spenser, 2026).

In the international academic tradition, the concept of resilience is defined as the process of successfully adapting to significant stressful or traumatic events. In particular, M. Rutter (2012) views resilience as a dynamic process involving the interaction of protective and risk factors, rather than as a stable personality trait. A similar approach is adopted by Southwick et al. (2014), who emphasise the role of neuropsychological, social and behavioural mechanisms in the development of stress resilience (3, p. 66).

In the works of Connor and Davidson (2003), resilience is defined as a person's ability to cope effectively with adverse circumstances and to recover functioning following crisis events. This approach formed the basis for the development of psychometric instruments to measure levels of professional resilience.

Contemporary models of professional resilience identify several interrelated key components that provide comprehensive protection for the individual in extreme working conditions. The first is the cognitive component, which determines a professional's ability to assess the current situation realistically, demonstrate cognitive flexibility, and constructively reframe stressful events. The next component, the emotional component, reflects the individual's overall level of emotional self-regulation and their immediate resilience to affective overload in crisis situations. In turn, the behavioural com-

ponent involves the active and appropriate use of adaptive coping strategies in stressful conditions to overcome crisis factors. The final element is the motivational-value component, which encompasses a well-established professional identity, deep intrinsic motivation and a high level of commitment to one's chosen profession.

For psychologists in the security and defence sector, the emotional component is particularly significant, as their work involves constant empathetic interaction with individuals who have experienced the traumatic events of war.

Scientific research identifies three main groups of interrelated factors that have a direct influence on the development and maintenance of professionals' resilience. The first group consists of individual psychological factors, which researchers define as a basic level of emotional stability, characteristics of self-esteem, cognitive flexibility, general resilience and the ability to consciously self-regulate mental states. The second group covers socio-professional factors, which include the quality of teamwork within the group, the level of emotional and practical support from colleagues, as well as the availability of systematic supervision and organisational support within the structure. The third important group consists of situational and contextual factors directly linked to the specific conditions of the legal regime of martial law, the overall intensity of stressful events, and the duration of continuous exposure to psychotraumatic environmental factors (Lazos, 2022).

The conditions of war significantly alter the nature of psychologists' professional activities. They are forced to work in situations of high uncertainty, with limited time for recovery and under constant emotional strain. This leads to an increased risk of secondary traumatisation and emotional burnout, which directly affects the level of professional resilience (Tarasenko & Assonov, 2024).

According to recent research, in crisis situations, mechanisms such as social support, conscious coping strategies, professional supervision and the development of self-regulation skills play a key role in maintaining resilience (Overchuk, 2022). These factors act as a reliable protective resource for the individual, reducing the level of emotional exhaustion and preventing destructive professional distortions in conditions of martial law.

The professional resilience of psychologists in the security and defence sector is a complex, multi-level phenomenon shaped by a combination of individual resources, the professional environment, and the specific conditions of wartime. Its effective study requires a comprehensive approach that combines theoretical analysis and empirical measurement.

The empirical stage of the study aimed to determine the level of professional resilience among psychologists in Ukraine's security and defence sector under martial law, as well as to identify its interrelationships with indicators of emotional burnout, secondary traumatisation and coping strategies. The data obtained enabled a preliminary quantitative and qualitative assessment of the psychological state of the study group.

The results of the psychodiagnostic assessment showed that the level of professional resilience within the sample was inconsistent. Three groups of respondents were provisionally identified: high level of professional resilience; moderate level of professional resilience; and low level of professional resilience.

The largest proportion of respondents demonstrated a moderate level of professional resilience, indicating the presence of sufficient but unstable psychological resources to cope with occupational stress. At the same time, a significant proportion of the respondents showed signs of emotional exhaustion and increased fatigue, which may be an indicator of the risk of professional burnout.

Analysis of data on the Maslach Burnout Inventory revealed moderate to high levels of emotional exhaustion among a significant proportion of respondents. The most pronounced components were:

– emotional exhaustion as a consequence of chronic stress;
– a reduction in professional achievements;
– partial depersonalisation in interactions with clients.

A negative correlation was found between the level of professional resilience and emotional burnout, confirming the findings of recent research on the interdependence of these phenomena.

Further analysis of secondary traumatisation indicators revealed that a significant proportion of psychologists exhibit moderate or elevated levels of secondary traumatic stress symptoms. The most frequently observed manifestations were:

– emotional overload following work with traumatic cases;
– intrusive thoughts related to clients' experiences;
– increased fatigue and reduced emotional sensitivity.

The results obtained are consistent with data from international studies, which indicate a high risk of secondary traumatic stress among professionals in the helping professions working in war and disaster zones.

An analysis of coping behaviours showed that respondents predominantly use adaptive stress management strategies, in particular planning and cognitive reframing of the situation, seeking social support, and active problem-solving.

At the same time, a tendency towards avoidance and emotional distancing was observed among some respondents, which correlates with reduced professional resilience and an increased risk of burnout.

Correlation analysis revealed the following trends:

– a positive correlation between the use of adaptive coping strategies and the level of professional resilience;
– a negative correlation between emotional exhaustion and professional resilience;
– a positive correlation between secondary traumatisation and the level of emotional exhaustion.

These results confirm the systemic nature of professional resilience as an integral psychological phenomenon that depends on a combination of personal and situational factors.

Empirical data indicate that the professional resilience of psychologists in the security and defence sector under martial law is under significant strain and requires systematic support. The most vulnerable are professionals with high levels of emotional exhaustion and a predominance of maladaptive coping strategies.

The empirical results obtained allow for a comprehensive generalisation of the characteristics of the professional resilience of psychologists in Ukraine's security and defence sector under martial law. At this stage, it is important not only to establish the levels of the indicators under study, but also to analyse their interaction and the psychological logic of their formation under conditions of prolonged stress.

An analysis of the empirical data indicates that professional resilience within the study group is highly dynamic in nature and cannot be regarded as a stable personality trait. Most respondents exhibit a state of so-called 'functional resilience', where a professional is able to perform their duties but does so at the expense of significant depletion of internal psychological resources.

These findings are consistent with contemporary approaches to understanding resilience as an adaptive process that varies under the influence of the intensity of external stressors and the availability of support resources.

One of the key findings of the study is the identification of a consistent negative correlation between the level of professional resilience and indicators of emotional burnout. In particular, an increase in the level of emotional exhaustion is accompanied by a reduction in the capacity for effective professional self-regulation and adaptation.

Emotional exhaustion in this context acts not only as a consequence of chronic stress, but also as a distinct systemic factor that gradually erodes the specialist's psychological resources. This confirms the view of Maslach and Leiter (2016) that burnout is the result of a prolonged imbalance between the demands of the profession and the individual's resources.

Particular attention is drawn to the impact of secondary traumatisation, which, in a state of martial law, is becoming widespread among psychologists working in the security and defence sector. Constant exposure to the traumatic experiences of military personnel and civilians leads to a specific form of emotional exhaustion, combining symptoms of stress, anxiety and reduced empathic stability.

According to the data obtained, secondary traumatisation is directly linked to a reduction in professional resilience and indirectly affects the quality of professional interaction with clients.

An important finding is the identification of the role of coping strategies as a moderator between professional resilience and stress loads. Professionals who use active and problem-focused stress coping strategies demonstrate higher levels of adaptation and resilience.

Conversely, avoidance, emotional distancing and passive coping strategies correlate with reduced professional resilience and an increased risk of burnout. This is consistent with Lazarus and Folkman's (1984) classic transactional model of stress, according to which it is the cognitive assessment of the situation and the choice of coping strategy that determine the level of adaptation.

A synthesis of the findings allows us to view professional resilience as a systemic phenomenon that emerges at the intersection of three levels:

1) the individual level (psychological resources, self-regulation);
2) the micro-level of professional activity (nature of work tasks, emotional strain);
3) the organisational level (support, supervision, working conditions).

An imbalance between these levels leads to a gradual decline in resilience and the development of professional burnout.

The research findings confirm the complex and multifactorial nature of professional resilience among psychologists in the security and defence sector. The conditions of martial law act as a powerful external stressor, which heightens the importance of individual resources and organisational support in ensuring professional effectiveness.

The results of theoretical and empirical analysis demonstrate the need to develop and implement systematic measures aimed at enhancing the professional resilience of psychologists in Ukraine's security and defence sector. The conditions of martial law exert a prolonged stressful impact that cannot be compensated for by the individual resources of specialists alone, which necessitates organisational and programmatic solutions at the level of institutions and the psychological support system.

One of the key areas for improving professional resilience is the creation of an effective system of psychological support for psychologists themselves. International practice has shown that regular supervision is one of the most effective tools for preventing emotional burnout and secondary traumatisation. Supervisory support enables professionals to work through complex clinical cases, reduce emotional strain and develop professional reflection.

Of particular importance is the introduction of intervision groups, within which psychologists can exchange experiences, discuss complex professional situations and receive emotional support from colleagues. Such groups help foster a sense of professional community, which is an important resource for resilience.

Preventing professional burnout is an integral part of enhancing professional resilience. Effective measures include: regular psychological assessments of professionals; the implementation of psycho-emotional recovery programmes; training in self-regulation and stress management techniques; and the development of mindfulness skills.

According to recent research, the development of mindfulness and emotional regulation skills significantly reduces levels of professional stress and improves the ability to recover from emotionally challenging situations.

An important area of focus is the development of adaptive coping strategies among psychologists. These include active problem-solving, cognitive reframing of situations, and seeking social support. Research highlights that the use of problem-focused coping in particular is associated with higher levels of professional resilience and lower levels of emotional exhaustion.

In contrast, avoidance and emotional distancing may act as short-term defence mechanisms, but in the long term they increase the risk of burnout and reduced professional effectiveness.

Organisational factors play a distinct role, in particular the optimisation of workload, ensuring regular rest and recovery, creating a safe psychological environment, and developing a culture of support within teams.

International experience shows that organisational support is a critical factor in building resilience among professionals in the helping professions, particularly in times of crisis and armed conflict (Harbuzova et al., 2024).

Enhancing the professional resilience of psychologists in the security and defence sector requires a comprehensive approach combining individual, group and organisational measures. Only the systematic integration of psychological support, burnout prevention and the development of professional competencies can ensure the stability and effectiveness of specialists' work under conditions of prolonged military stress.

The findings of this study provide a comprehensive interpretation of the psychological characteristics of professional resilience among psychologists in Ukraine's security and defence sector under martial law. The observed variation in levels of professional resilience suggests that this characteristic is not a fixed trait, but is shaped by a combination of individual resources, professional experience and the organisational environment.

The prevalence of an average level of professional resilience in the sample may indicate a state of 'unstable adaptation', where psychologists are generally able to perform their professional duties, yet their internal resources are under constant strain. These findings are consistent with data from international studies, which indicate that in conditions of prolonged crisis events, resilience takes on a wave-like character and depends on the intensity of external stressors (Rutter, 2012).

The identified negative correlation between professional resilience and emotional burnout confirms the tenets of contemporary stress models, according to which the depletion of personal resources leads to a reduction in adaptive capacity. Of particular significance is the component of emotional exhaustion, which acts as a central predictor of reduced professional effectiveness.

The results confirm that burnout is one of the key factors directly influencing the level of professional resilience among psychologists in crisis situations.

The level of secondary traumatisation identified in a significant proportion of respondents indicates its systemic nature in the professional activities of psychologists in the security and defence sector. This is consistent with recent research identifying secondary traumatic stress as one of the most common occupational risks in the helping professions, particularly in wartime (Onyshchuk, 2025).

The link between secondary traumatisation and emotional exhaustion supports the hypothesis that constant exposure to clients' traumatic experiences is one of the key mechanisms leading to a decline in professional resilience.

The data obtained regarding the prevalence of adaptive coping strategies among some respondents indicate the presence of internal resources for coping with stress. At the same time, the avoidance strategies identified in part of the sample may be regarded as a sign of insufficient psychological support or resource overload.

International studies confirm that problem-focused coping and social support are the most effective factors in maintaining professional resilience among professionals working in crisis situations (Lazarus & Folkman, 1984).

A synthesis of the findings allows us to view the professional resilience of psychologists as an integrated system comprising:

– individual resources (self-regulation, cognitive flexibility);
– professional factors (experience, competence);
– organisational conditions (support, supervision);
– the context of martial law as a constant external stressor.

Professional resilience is a dynamic process of balancing the demands of the environment against an individual's internal resources.

The findings generally align with contemporary international approaches to understanding resilience as a multidimensional and dynamic phenomenon. At the same time, they highlight the need to take into account the specific nature of Ukraine's wartime context, which significantly alters the conditions of psychologists' professional practice and increases the importance of systematic support for their mental health.

Conclusions. As a result of the theoretical and empirical study of the psychological characteristics of professional resilience among psychologists in Ukraine's security and defence sector under martial law, it has been established that the phenomenon under investigation is a complex, multi-level and dynamic psychological system, shaped by a combination of individual personality resources, characteristics of professional activity and the specific conditions of the military environment. The results obtained allow us to view professional resilience not as a stable trait, but as a process of constantly restoring psychological balance under conditions of prolonged stress.

Firstly, a theoretical synthesis of scientific approaches has shown that contemporary psychological science views professional resilience within the framework of the concept of resilience as a dynamic process of adaptation to adverse conditions. In this context, key to this is the proposition that resilience is formed at the intersection of cognitive, emotional, behavioural, and motivational-value components, which interact with one another and ensure an individual's ability to maintain professional effectiveness even under conditions of prolonged exposure to stressors. Of particular importance is the ability to cognitively reassess situations, engage in emotional self-regulation and employ adaptive strategies for coping with stress, which helps to mitigate the negative impact of traumatic events on the specialist's mental state.

Secondly, the empirical findings of the study revealed that, within the sample of psychologists working in the security and defence sector, an average level of professional resilience predominates; this can be regarded as a state of relative adaptation which, however, does not guarantee long-term stability in the face of increasing stressors. A significant proportion of respondents show signs of emotional exhaustion, manifested in reduced energy levels, increased fatigue and a diminished ability to recover from intense workloads. Manifestations of reduced professional achievement and partial depersonalisation were also identified, which are characteristic components of burnout syndrome.

Thirdly, a significant finding is the identification of pronounced manifestations of secondary traumatisation, which acts as one of the key negative factors contributing to a decline in professional resilience. Psychologists' constant exposure to the traumatic experiences of military personnel and civilians in the crisis conditions of war creates an additional emotional burden that accumulates and gradually leads to a decline in empathic stability, the emergence of intrusive thoughts and general psychological exhaustion. This confirms the systemic nature of the impact of secondary traumatisation on the professional activities of practitioners in the helping professions.

Fourthly, the study's findings showed that adaptive coping strategies play a key role in maintaining professional resilience, particularly problem-focused stress management, cognitive reframing of situations, and seeking social support. It is precisely these strategies that help reduce the intensity of the negative impact of stressors and contribute to the restoration of psychological resources. In contrast, problem avoidance, emotional distancing and passive behavioural strategies are associated with a decline in professional effectiveness and an increased risk of developing chronic burnout.

Fifthly, it has been established that the professional resilience of psychologists in the security and defence sector is systemic in nature and is determined not only by individual personality traits, but also by the characteristics of the organisational environment, the level of social support, the availability of supervisory support, and the overall culture of professional interaction within security sector institutions. Conditions of martial law significantly heighten the importance of organisational

resources, as individual capacities for self-regulation prove insufficient for the full restoration of mental well-being.

Sixthly, the findings suggest that, without the implementation of systematic psychological support measures, there is a high risk of a gradual decline in the professional resilience of specialists, which could have a negative impact on both their personal well-being and the effectiveness of the entire psychological support system within Ukraine's security and defence sector. In this regard, the implementation of programmes for the prevention of professional burnout, regular supervision, the development of self-regulation skills and the formation of resilient professional communities becomes particularly relevant.

Thus, the present study confirms the complexity and multidimensional nature of the phenomenon of professional resilience among psychologists in wartime conditions and highlights the need for further scientific investigation into the mechanisms of its formation, maintenance and development. Prospects for further research relate to an in-depth analysis of the effectiveness of specific intervention programmes aimed at enhancing resilience, as well as the development of practical models for psychological support for security and defence sector professionals in the context of protracted crisis situations.

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DOI https://doi.org/10.30525/2592-8813-2026-2-51

MANIFESTATIONS OF PROFESSIONAL DESTRUCTION AND PSYCHO-EMOTIONAL TENSION AMONG POLICE OFFICERS UNDER THE INFLUENCE OF CONTEMPORARY EXTREME FACTORS

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Abstract. The article provides a comprehensive analysis of professional deformation among employees of the National Police of Ukraine as a psychological phenomenon. It is substantiated that the fundamental prerequisite for the effectiveness of law enforcement activities lies in strict adherence to the rule of law and the protection of constitutional human rights and freedoms, which directly correlates with public trust – a dominant indicator of police performance. The author emphasizes that while professional deformation is an objective and often inevitable process inherent in various occupations, the policing profession is particularly susceptible to its onset and destructive progression. This vulnerability stems from specific operational conditions, a demanding range of professional duties, high psychophysical tension, and constant exposure to conflict-ridden environments. The study systematizes existing scholarly approaches to defining professional deformation and identifies its development as a result of a complex interplay between micro-social, macro-social, and individual determinants. It is demonstrated that the manifestations of professional deformation transcend the professional sphere, negatively impacting the officer's personal life and social environment. The article concludes that effective prevention and counteraction of this phenomenon require integrated efforts from law enforcement agencies, the state, and civil society.

Key words: professional deformation phenomenon, professional activity, professionally undesirable traits, police officer, human and civil rights, prevention, countermeasures.

Introduction. The Constitution of Ukraine defines the state as social and law-governed, founded upon the principle of the rule of law. Within this framework, the individual–including their life, health, honor, dignity, inviolability, and security–is recognized as the highest social value. The affirmation and protection of human rights and freedoms constitute the primary duty of the state, directly determining the substance and orientation of its institutional activities (Law of Ukraine No. 254k/96-BP. (1996). The implementation of these principles is largely entrusted to law enforcement agencies. Pursuant to Article 2 of the Law of Ukraine "On the National Police," the core mandates of the agency include ensuring public safety and order, protecting human rights and freedoms, as well as the interests of society and the state, combating crime, and providing assistance to persons in need due to personal, economic, social reasons, or emergencies (Law of Ukraine No. 580-VIII (20215).

Society places high demands on police officers, viewing them not merely as highly qualified specialists but as individuals possessed of a profound sense of civic responsibility and high moral and ethical standards. The complexity and accountability of these tasks necessitate rigorous criteria for the individual psychological traits and professional competence of personnel. Enhancing the personal, spiritual, and professional profile of law enforcement officers is a priority for the leadership of the Ministry of Internal Affairs of Ukraine. This, in turn, stimulates scientific interest in investigating negative attributes of professional conduct, specifically the phenomenon of professional deformation.

The scientific study of professional deformation among police officers is an urgent issue, as there is a critical demand for the development of effective mechanisms for its prevention and mitigation. This

demand holds significant weight in both theoretical and practical dimensions. The professional development (professiogenesis) of police officers, in the context of fulfilling their duties, is directly correlated with the evolution of personality traits that may, under certain conditions, negatively impact professional performance. Professional deformation of police personnel is a complex socio-psychological phenomenon, the analysis of which requires the comprehensive application of modern scientific instruments and interdisciplinary approaches.

The aim of the article is to provide a theoretical substantiation and a comprehensive characterization of the phenomenon of professional deformation among employees of the National Police of Ukraine.

Analysis of Recent Research and Publications. Despite significant scientific and practical interest in this issue – driven primarily by the imperative to enhance the effectiveness of law enforcement activities – the problem of professional deformation still requires systematic investigation. The essence of this phenomenon has been explored in the works of both domestic and international specialists, including: O. Bandurka, V. Barko, I. Holosnichenko, O. Dzhuza, R. Kaliuzhnyi, Z. Kisil, V. Kovalenko, M. Kostytskyi, I. Klymenko, N. Miloradova, S. Slyvka, D. Shvets, O. Tsilmak, as well as C. Maslach, W. Schaufeli, G. J. Sixma, D. van Dierendonck, among others.

Presentation of the main material. Professional activity is an integral component of an individual's life journey and a significant factor in their development and socialization. At the same time, professional self-realization, alongside positive achievements, can lead to certain negative consequences. One such manifestation is professional deformation–an objectively probable, though not inevitable, «shadow side» of a profession. At a subjective level, it emerges as a consequence of excessive narrow-profile specialization and an ultra-high level of aspirations. Although professional deformation can occur in any field, it is most commonly found among representatives of "person-to-person" professions, such as educators, lawyers, and service workers (D. Shvets (2018)).

Most researchers interpret the phenomenon of professional deformation as a result of an individual's misalignment with generally accepted professional norms. This manifests in the formation of rigid behavioral patterns, the transfer of professional roles into the sphere of extra-service relationships, and the destructive transformation of personality traits under the influence of professional specificities (Kirbyatyev, O. (2019); V. Markovskyi (2020).

The phenomenon of professional deformation originates from destructive changes in the structure of professional activity and the specialist's behavior at both social and psychological levels. A significant number of researchers link professional deformation with negative transformations in the socio-psychological architectonics of the individual [Z.Kisil & R.-V. Kisil (2020); D. Shvets (2018)). This position is shared by foreign scholars as well. In particular, L. Ternovska & V. Ternovskyi (1995) view professional deformation as a prolonged, multifaceted process of disruption in the personality's mental structures, which causes numerous functional changes in professional activity M. Velikodna (2013). For his part, D. Green (2009) notes that the etiology of professional deformation lies in the narrowing of ethico-moral perception and the dominance of stereotypical attitudes, leading to a confrontation between the individual and established social norms.

The process of deformation initially develops at the intra-personal level, subsequently manifesting in professional behavior and impacting the immediate social environment. H. Langerock (1915) treats this phenomenon as the result of a long-term influence of specific professional factors, leading to the hyperbolization of the professional role's significance within the general structure of the individual's life activities. The hypertrophied development of certain character traits often causes professional unsuitability, violations of legislative norms, or the commission of immoral acts. Thus, the development of professional deformation exert a destructive influence on the specialist's motivational orientation and value systems.

The perspective of D. Shvets (2024) is well-substantiated, stating that the ultimate degree of professional deformation is professional degradation. It is characterized by immoral behavior, legal offenses, and other manifestations of social maladaptation. Special attention should be given to studying the impact of professional deformation on the communicative sphere of employees' activities [26].

Most domestic scholars lean toward understanding professional deformation as a manifestation of rigid professional adaptation of the personality to environmental requirements. This process becomes an obstacle to the further professional and personal development of the subject (O. Kirbyatyev (2019); T. Garasimov (2012); S. Gryshchenko (2012); O. Kirbyatyev (2019; Z. Kisil & D. Shvets, V. (2022)). Furthermore, deformation can result from professional disappointment, which manifests as excessive stereotyping of activities, a simplified approach to solving service tasks, and the transfer of specific professional behavioral patterns into the extra-service sphere of life (J. Green (2009); V. Medvedev (1999)).

The problem of professional deformation remains extremely acute for law enforcement agencies, whose personnel are constantly under the intensive destructive influence of the environment. This is conditioned by the specific nature of service activities, as well as the psychological and criminological characteristics of the objects of influence–individuals or groups who are often carriers of antisocial attitudes. In scientific literature, such influence is metaphorically compared to «psychological radiation», which, under prolonged exposure, causes personality defects and moral anomalies in law enforcement officers (O. Reva & S. Boyko (2009)).

In alignment with the position of Yu. Aleksandrov (2012), professional deformation should be understood as the result of a discrepancy between the personality and the socio-professional norm. This is manifested in the consolidation of rigid behavioral stereotypes, the transfer of the professional role into the sphere of private relationships, and the destructive transformation of the personality under the influence of specific working conditions (Yu. Aleksandrov (2012)). In turn, A. Kuruch (2013) defines this phenomenon as a negative distortion of the employee's personal qualities and performance results, determined by accumulated professional experience and unfavorable service conditions.

Professional deformation among the personnel of the National Police of Ukraine is a destructive phenomenon that causes significant damage to the functioning of the entire system of security and defense forces, effectively nullifying the professional suitability of specialists who have fallen under its influence. A discussion regarding the determinants of this state continues in scientific circles. In particular, Professor V. Medviediev (1999) views professional deformation as a kind of «price» that a specialist pays for a high level of professional aspirations and excessive involvement in the activity. The researcher notes that this phenomenon is a complex of interrelated changes in individual qualities and the personality as a whole, arising as a result of performing law enforcement functions.

An important thesis concerns the differentiated nature of deformation depending on the specialization of the unit. The most intensive destructive impact has been recorded among criminal investigation officers; a medium degree of intensity is characteristic of the patrol service and investigative units, while a relatively low level is observed in human resources and administrative services (V. Medviediev (1999)).

The key prerequisites for the genesis of professional deformation include: long-term work experience in extreme conditions and a psychological misalignment between an individual’s personal qualities and the high demands of professional activity. The permanent influence of negative factors within the service environment causes an increase in internal tension, self-dissatisfaction, discomfort, and insecurity. The prolonged impact of such situations consolidates destructive mental states, which subsequently transform into stable negative personality traits.

Based on the nature of its manifestations, professional deformation can be divided into two forms:

1. *Overt Professional Deformation:* indifference and cruelty in the treatment of offenders, detainees, or suspects; a conviction of one's own permissiveness and the disregard for ethical norms; excessive suspicion and a pronounced accusatory bias; the use of unlawful methods of work based on the

principle that «the end justifies the means»; addictive behavior (specifically alcohol dependence) and the degradation of speech culture (the use of criminal slang).

2. *Covert Professional Deformation:* abuse of power and the prioritization of self-serving motives; immoral behavior in private life and spiritual regression; a distorted understanding of service interests and professional reputation; the concealment of crimes and the pursuit of unlawful benefits; association (entrenchment) with criminal elements.

Significant insights are provided by the research of V. Bodnar (2018), who identifies the determinants contributing to the commission of torts (delicts) by police officers. Dominant among these are: formal-bureaucratic management methods (58.3%); professional burnout and fatigue, which generate indifference toward service (52.3%); the collective's orientation toward «anti-values» (49.6%); and the formation of a «double standard of morality» (35.6%) alongside an atmosphere of «mutual concealment» or *krugovaya poruka* (35.6%). Additionally, a psychologically conflict-prone atmosphere within the unit and a low level of adaptation of individual employees to the collective's ethical norms exert a substantial influence.

Contemporary researchers adhere to a multidisciplinary approach to revealing the essence of professional deformation, viewing it as the result of the interaction between the specifics of professional activity, social roles, and the individual psychological properties of the personality. As noted by I. Khorzhevskyi & V. Tsarapora (2013), professional activity itself serves as the key determinant in the development of personality destructions.

Objective factors related to the quality of the law enforcement system's functioning are of significant importance. L. Makotchenko & V. Shablystyi (2020) emphasize that inconsistent legal policy, constant reorganizations, and the misalignment of the system's resources with actual crime rates destabilize the work of police officers, creating a foundation for professional deformation.

The specifics of the legal regulation of police activities also exert a dual influence. On one hand, strict adherence to the law is the foundation of the activity; on the other hand, excessive normativity can stimulate formalism and bureaucratization. O. Kirbiatiev (2019) observes that the desire to act exclusively according to a template, without a deep analysis of the substance of legal norms, leads to the excessive formalization of service.

The issue of professional resilience acquires particular significance under the conditions of martial law. Constant interaction with citizens in need of emergency assistance, combined with the awareness of high responsibility for decisions made, provokes a state of anxiety and emotional tension. N. Dubinchuk *at all* (2018) reasonably assert that during wartime, the workload and the degree of responsibility increase exponentially, serving as a powerful predictor for the formation of deformational personality traits.

Organizational uncertainty also acts as a potent stressor. V. Markovskyi (2020) points out the risks associated with blurred job descriptions: the lack of a clear algorithm of action places the police officer before a dilemma between professional inactivity and the potential abuse of power.

The consequences of professional deformation are complex and extend to three spheres:

1. *Social sphere***:** the formation of a negative image of the police and a decrease in the level of public trust (although the general level of trust in the National Police of Ukraine has recently increased, risks remain pertinent) (Z. Kisil & D. Shvets, V. (2022); Yu. Merkulova (2017)).

2. *Personal sphere***:** professional burnout, loss of motivation for development, deterioration of mental health indicators, and general life dissatisfaction (M. Kravtsova & T. Datsyuk (2022)).

3. Professional sphere: a decrease in the efficiency of task performance, violations of service discipline and legality, and manifestations of deviant behavior.

The particular danger of deformation in the professional sphere lies in the threat of violating fundamental human rights and freedoms, which nullifies the core mission of law enforcement agencies.

The position of M. Kravtsov & T. Datsiuk (2022), who identify an insufficient level of psychological support as one of the key organizational factors in the genesis of professional deformation, should be supported. The researchers emphasize that the systematic provision of psychological literacy, the implementation of individual counseling, and the integration of rehabilitative and therapeutic work would significantly reduce staff turnover, minimize the number of suicide attempts, and decrease violations of service discipline. Timely diagnosis of deformational signs is a prerequisite for providing effective psychological assistance to personnel.

An analysis of the scientific literature provides grounds to assert that professional deformation is a universal phenomenon inherent to representatives of all types of professions; however, it acquires particular severity within the activities of the National Police of Ukraine. The primary groups of determinants for this process are socio-political, administrative-organizational, spiritual, and economic factors. It is often professional deformation itself that becomes the root cause of the abuse of power and the violation of the constitutional rights of citizens.

We believe that the introduction of a deontological model of law enforcement requires profound conceptual rethinking and regulatory consolidation. To date, the term "professional burnout" and its prevention mechanisms are insufficiently reflected in domestic legislation. It appears expedient to implement international experience (USA, France, Germany), where "Codes of Deontological Conduct for Police" operate at the regulatory level, governing the ethical aspects of service.

Conclusions. The phenomenon of professional deformation in a National Police officer represents a radical transformation of individual attributes within the context of professional activities. The primary determinants arising from the specifics of police work that facilitate professional deformation include: rigorous legal regulation of duties, significant discretionary power over subjects of interaction, professional corporatism, a heightened degree of individual responsibility for outcomes, psychological and physical exhaustion, and the inherent risks and extreme conditions of service.

Professional deformation exerts a negative impact not only on the officer's professional performance but also on their spiritual, cognitive, motivational, and emotional spheres. Ultimately, this phenomenon leads to an increase in violations of service discipline and legality, causes irreparable damage to professional interests, and provokes negative public perceptions of law enforcement. It undermines professional ethics and erodes the public image of the National Police of Ukraine.

Prospects for Further Research. Future research should focus on developing a modernized framework for the prevention of professional deformation among law enforcement officers. This involves synthesizing international deontological standards with innovative psychological support systems to ensure the integrity and mental resilience of personnel, especially under the ongoing pressures of contemporary extreme factors.

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DOI https://doi.org/10.30525/2592-8813-2026-2-52

PSYCHOLOGICAL FEATURES OF PERSONNEL MOTIVATION

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Abstract. The article describes the psychological features of personnel motivation. In particular, an analysis of internal and external factors that influence employee motivation was carried out. 35 people aged 25 to 40 years participated in the study. To analyze the motivational component, the «Motivation Sources Inventory (MSI)» developed by J. Barbuto and R. Scholl and the «Motivational Profile» by S. Ritchie and P. Marrtina were used. According to the results of the study, the main motivational factor is the financial component. Also, a large number of employees strive for professional fulfillment. Prospects for further research are to conduct a comparative analysis of motivational profiles and levels of job satisfaction depending on the length of service and age of employees, as well as to study the impact of these indicators on productivity.

Key words: motivation, personnel, work, factors, features, influence.

Introduction. The problem of personnel motivation is relevant, as it affects the results of activity. The features of psychological motivation have been studied by many domestic (O. Bilichenko, T. Bondar, A. Krasnonos and others) and foreign (F. Herzberg, A. Maslow) scientists (Bilichenko, 2012; Bondar & Krasnonos, 2023; Herzberg, 1959; Maslow, 1943).

In world practice, great attention has always been paid to the issue of staff motivation in order to obtain maximum overall productivity. This will contribute to achieving goals and ensuring effective operation of the enterprise. In modern conditions of a market economy and rapid changes in the external and internal environment, it is necessary to develop new management mechanisms and maintain the parameters of production processes. Foreign and Ukrainian enterprises practice new approaches to determining methods of staff motivation. This indicates a tendency to significant changes in this area (Bondar & Krasnonos, 2023).

Other researchers also confirm the influence of motivation on professional activity. “The determining factor in increasing labor productivity, as O. Bilichenko writes, remains labor motivation” (Bilichenko, 2012: 119).

The highest value of any organization is the people who work in it. Employee motivation is a component of organizational policy, since the effectiveness of subordinates' work directly ensures the functioning of the institution and the achievement of its goals. Because of this, the issues of labor stimulation remain a priority for enterprises, regardless of their profile. Managing psychological factors of motivation is a necessary condition for optimizing the management system as a whole. Taking into account the needs of employees allows them to be involved in work processes to obtain the necessary results. The role of motivation in modern management models is significant, because it encourages a person to work with full dedication, which determines the overall effectiveness of the organization's activities. (Halynska, 2023: 1).

The importance of motivation within progressive management systems is undoubtedly enormous, because it is a powerful internal incentive that motivates a worker to work diligently to achieve professional goals.

The theory of motivation was described in detail in his works by A. Maslow. Its essence is that the subject of psychology is behavior, not human consciousness. Behavior is based on human needs, which can be divided into five groups: physiological needs – the need for food, water, and rest; needs for security and certainty in the future – protection from physical and other dangers from the outside world and confidence that physiological needs will be satisfied in the future; social needs – the need for a social environment, communication with people, a sense of support; needs for respect, recognition from others, and the desire for personal achievement; the need for self-expression – the need for one's own growth and realization of potential opportunities (Bilichenko, 2012: 122–123; Maslow, 1943: 372–383).

Foreign researchers F. Herzberg, B. Mausner and B. Snyderman describe two groups of factors that influence personnel motivation:

The first group of factors relates to the continuum of satisfaction: recognition, responsibility, opportunity for growth, success in work, the content of the work itself. When these factors cause a feeling of satisfaction, it keeps the individual in a state of equilibrium or increases his motivation and at the same time improves productivity. It is important to note that these factors belong to the very content of the individual's functions.

2) The second group of factors (the continuum of dissatisfaction) primarily contributes to employee dissatisfaction: company policy, administration, quality of supervision, salary, interpersonal relationships, working conditions. These components are related to working conditions and characterize the field of activity. When employees are satisfied with these conditions, they remain in a neutral state, but motivation does not increase. Dissatisfaction can upset the balance, causing negative reactions, for example, a decrease in production (Herzberg, Mausner, & Snyderman, 1959: 276).

That is why the issue of staff motivation requires careful study.

The purpose of the work is to analyze the psychological characteristics of staff motivation and identify the main factors influencing employee motivation.

The main part. To achieve the goal, the following tasks were set:

1) theoretical analysis of the scientific basis on the topic of the wor;

2) conducting an empirical study of personnel motivation;

substantiation of scientific results and formation of methods for increasing motivation.

Materials and research methods. The following methods were used to conduct the study:

1) theoretical: analysis of psychological literature, generalization of results;

2) empirical: testing using the "Questionnaire of sources of motivation (Motivation Sources Inventory – MSI)» developed by J. Barbuto and R. Scholl (1998), "Motivational profile" (Motivational Profile)» S. Ritchie and P. Marrtina (1999).

The selected methods allow us to investigate the structure and direction of personnel motivational factors from different perspectives. In particular, the “Motivation Sources Inventory (MSI)” by J. Barbuto and R. Scholl (1998) is aimed at diagnosing five main sources of motivation on the following scales: Internal processes, Instrumental motivation, External self-concept, Internal self-concept and Internalization of goals.

The Internal Processes scale allows you to explore the state in which the main incentive for the employee is satisfaction with the work. The employee receives positive emotions from the current activity, regardless of future reward or recognition. If the work process becomes routine or uninteresting, motivation drops rapidly, since for the employee the main thing is the positive emotional coloring of the activity itself.

The Instrumental Motivation scale helps to investigate the impact of work as a means or tool for obtaining specific external benefits. In this case, the employee's behavior is aimed at material gain, receiving bonuses, bonuses or promotion for higher income. A person with a high score on this scale constantly assesses the relationship between the efforts expended and the amount of reward that he will receive as a result, so his activity directly depends on the system of material incentives at the enterprise.

The External Self-Concept scale refers to an employee's orientation to the opinions of others and their desire to achieve high status in the team. Motivation here is based on the desire to meet the expectations of other people, to earn their approval, respect, or public recognition of their achievements. For such a person, feedback from management and colleagues is critically important, and their self-esteem and work enthusiasm directly depend on how valuable and successful they are considered by their social environment.

The Internal Self-Concept scale helps to explore the individual's desire to meet their own internal standards of competence and professionalism. Unlike the previous factor, here the person is guided not by external praise, but by a personal sense of mastery and the quality of the work performed. The employee challenges himself, trying to prove his own ability to solve complex tasks, which allows him to maintain high self-esteem through internal confirmation of his professional strength.

The Internalization of Goals scale represents the highest level of involvement, in which the values and goals of the organization become the employee's personal beliefs. A person works with full dedication not for money or status, but because he sincerely believes in the importance of his company's mission or the social benefit of his activities. This type of motivation is the most stable, since it is based on the moral principles and ideological foundations of the individual, which encourages him to act in the interests of the common cause even in the absence of additional external incentives.

The Motivational Profile methodology by S. Ritchie and P. Martin (1999) allows you to determine the priority of twelve key personnel needs on the following scales: Material reward (the need for a high level of remuneration and financial bonuses), Physical working conditions (the desire for a comfortable, safe and ergonomic working environment). Structured work (the need for clear instructions, rules and minimization of uncertainty), Social contacts (the need to communicate with a wide range of people while performing duties), Relationships (the need to form long-term, trusting and friendly relationships with colleagues), Recognition (the desire to receive public approval, respect and positive assessment of one's achievements), Achievement (the internal need to set ambitious goals and successfully implement them independently), Power and influence (the desire to manage other people, to direct them and take responsibility for the result), Diversity and change (the desire to avoid routine, interest in new tasks and constant change of activities), Creativity (the need to find non-standard solutions, generate innovative ideas and show initiative), Self-development (the need for continuous professional training, broadening of horizons and personal improvement) and Social utility (the desire to perform work that is meaningful and brings real benefits to other people or society as a whole). Such a comprehensive approach helps to identify the most effective incentives for a particular employee in the enterprise's labor potential management system. Let's consider the concept of motivation in more detail. Motivation is a complex process of encouraging a person to action, guiding their behavior, setting their direction and benchmark for achieving certain goals. (Chilikina, 2021: 181).

Ukrainian researcher S. Zaniuk defines motivation as a set of motivating factors that influence the activity of a person, that is, all motives, needs, situational factors that determine human behavior (Zaniuk, 2002: 94).

“Motivation is a type of managerial activity that provides the process of encouraging a person to act effectively, aimed at achieving personal goals or organizational goals,” write V. Evtushenko and D. Dorenskyi. (Evtushenko & Dorenskyi, 2020: 39).

A. Pochtovyuk, V. Semenikhina and M. Komsomolsky describe general motivation and professional. General motivation is a focus on work as a form of human activity in any activity. Professional motivation is a system of motives that characterizes the desire to perform certain professional tasks. According to the ideas about the definition of motives, the specificity of professional motivation is determined by the features of professional goals of activity (Pochtoviuk, Semenikhina, & Komsomolskyi, 2021: 122).

Many scientists describe motivation as a means of increasing labor productivity. But the activity must be organized in such a way as to bring satisfaction to employees with the results of work. As a result of the implementation of the above, high labor productivity, efficiency of activity, and growth of enterprise income will be achieved, which will ensure its competitiveness in market conditions. (Iliash & Kaperiz, 2011: 169).

Also, as O. Ilyash and M. Kaperyz write, the personnel motivation system is implemented through the creation of a competitive workforce and labor efficiency at the enterprise (Iliash & Kaperiz, 2011: 170).

Having considered the above definitions, we can conclude that one part of scientists defines motivation as an internal incentive or desire of employees to satisfy their own needs, and the other – as the process of motivating employees to work effectively. There is an opinion that the process of motivating personnel to productive activity should be understood as stimulation, not motivation. However, the concept of motivation is broader than the concept of stimulation. Stimulation is understood as the use of external factors that force an employee to work productively and improve their performance. Motivation is the process of encouraging a person to a certain activity with the help of both intrapersonal and external factors. Having analyzed the application of the concept of motivation, we can say that its essence will depend on the meaning in which it is used. If we consider motivation from the point of view of employee psychology, then this concept can be interpreted as an internal incentive of an employee to perform his work and achieve established organizational goalsIf we consider motivation as a management function, then it will be part of the process implemented by the manager (identifying motives and developing means aimed at achieving the individual goals of the employee and the goals of the organization) (Zos-Kior & Skydan, 2020: 144–145).

The current task of motivation today can be called the combination of the goals of the individual and the organization. As is known, the main goal of any company is to make a profit and achieve its constant increase. Every employee wants to receive a large salary and strives for its increase. If the employee understands that with the increase in profit, the income to the payroll will also increase, then his labor productivity will increase (Zos-Kior & Skydan, 2020: 144–145).

The main functions of motivation are incentive, directing, stimulating and regulatory. The incentive function is manifested in the purposeful activity of the individual. The implementation of this function is associated with the strength of motivation. The directing function of motivation is manifested in the choice of a strategy of behavior, goals, means and methods of activity; its implementation depends on the stability of motives. The stimulating function is associated with maintaining motivation at the required level and overcoming obstacles. It plays an important role in the performance of work activities. The regulatory function of motivation is aimed at ensuring management and control over activities. The implementation of this function depends on the stability, multiplicity of motives (Pochtoviuk, Semenikhina, & Komsomolskyi, 2021: 121).

That is, the concept of motivation is quite broad, it covers a set of internal and external factors that encourage employees to perform professional activities. This is a complex mechanism that not only activates a person's professional potential, but also directs their efforts to achieve specific work goals. As a result, it is the level of motivation that determines how effectively an employee will use their experience and knowledge for the success of the entire enterprise.

Research results. To study the psychological characteristics of personnel motivation, an empirical study was conducted, in which 35 people aged 25 to 40 years participated. The sample is quite justified for the tasks set, since this age category is characterized by the highest level of professional and social activity, an already formed system of life values, as well as a conscious attitude to one's career and material security. At the first stage of the analysis of the obtained data, the primary statistical processing of the results was carried out using both methods. To summarize the quantitative indicators, the arithmetic mean, variance, standard deviation, mode, and median were calculated. These statistical parameters allowed not only to identify motivational priorities typical for the entire group, but also to assess the degree of differences in the views of individual employees. (таблиця 1).

Table 1

Descriptive statistics of indicators according to the "MSI Motivation Sources Questionnaire"

Indicator	"MSI Motivation Sources Questionnaire"				
	Internal processes	Instrumental motivation	External concept of "I"	Internal concept of "I"	Internalization of goals
Average value	4,12	5,85	3,95	5,1	3,6
Dispersion	1,45	0,98	1,62	1,15	1,8
Mean squared	1,2	0,99	1,27	1,07	1,34
Fashion	4	6	4	5	3
Median	4	6	4	5	3

Analyzing the data in Table 1, it can be noted that the distribution of responses is close to normal, since the values of the mode, median and arithmetic mean practically coincide on all scales. The highest average score was demonstrated by respondents on the Instrumental Motivation scale (5.85). At the same time, the dispersion indicator (0.98) and the standard deviation (0.99) on this scale are the lowest. This indicates a high unanimity of the sample: the absolute majority of employees consider material incentives (salary, bonuses, bonuses) to be a key factor in their professional activity. The second most significant was Internal Self-Concept (5.1), which indicates the desire of employees to meet their own internal standards and perform work that challenges them intellectually. The least pronounced was Internalization of Goals (3.6), which is characterized by high variability of responses (variance 1.8).

The results of statistical processing using the "Motivational Profile" method by S. Ritchie and P. Martin are presented in Table 2.

The data in Table 2 confirm and expand the results of the previous methodology. The Material Reward scale is the undisputed leader (average value – 42.3). However, it is immediately followed by higher-order needs with a minimal gap: Aspiration for Achievements (39.4) and Self-Development (38.2). The lowest positions were occupied by Structured Work (25.1) and Social Utility (24.3). The greatest dispersion of opinions (variance – 25.3) was recorded on the Power and Influence scale. For one part of the employees, career growth to management positions is extremely important, while the other part shows complete indifference to this, preferring calm executive work. This allows the company to effectively distribute tasks between different specialists.

For a more clear understanding of the motivation structure, the proportion of respondents for whom specific factors are dominant was determined (Table 3). It is worth noting that each respondent could have several clearly expressed dominant motives.

Table 2

Descriptive statistics of indicators according to the "Motivational Profile" method

Показник	«Мотиваційний профіль»											
	Матеріальна винагорода	Фізичні умови праці	Структурованість	Соціальні контакти	Взаємовідносини	Визнання	Прагнення до досягнень	Влада та вплив	Різноманітність і зміни	Креативність	Саморозвиток	Суспільна корисність
Середнє значення	42,3	28,4	25,1	31,2	33,5	36,8	39,4	27,6	30,1	29,5	38,2	24,3
Дисперсія	18,5	22,1	19,8	20,5	17,4	15,2	14,8	25,3	21,6	23	16,5	24,1
Сер. квадр.	4,3	4,7	4,45	4,52	4,17	3,89	3,84	5,03	4,64	4,79	4,06	4,9
Мода	45	28	24	30	35	38	40	25	30	28	38	22
Медіана	43	28	25	31	34	37	40	27	30	29	39	24

Table 3

Distribution of dominant motivational factors among employees

Motivational factor (areas of need)	Absolute value (number of people)	Relative value (%)
Material reward / Instrumental motivation	28	80
Striving for Achievement / Professional Realization	22	63
Self-development / Internal concept of "I"	19	54
Recognition of work results by others	15	43
Relationships and social contacts in the team	12	34
Comfortable physical working conditions	9	26
The need for power, leadership, and influence	6	17

As the relative indicators show, for 80% of the respondents, the material factor is decisive. However, for many respondents, professional fulfillment and an internal desire to develop are also important factors.

Discussion. The obtained empirical results confirm and significantly deepen classical motivational theories, projecting them onto the modern realities of the domestic labor market. According to F. Herzberg's two-factor theory, salary belongs to the so-called "hygiene factors", which usually only prevent dissatisfaction, but do not motivate to increase efficiency. However, our study clearly demonstrates another trend: in modern socio-economic conditions, instrumental motivation and material reward acquire the status of a powerful, leading motivating factor. This becomes the basic foundation for any professional activity. Such a phenomenon is easily explained by the age characteristics of the studied sample (25–40 years). This life stage is a period of the highest socio-economic activity, when a person forms a family, solves housing issues and strives to ensure a stable level of material well-being. (Herzberg, Mausner, & Snyderman, 1959: 276).

The influence of financial factors on staff motivation is also confirmed by other researchers. In particular, T. Hrynko, T. Gviniashvili, A. Shynkarenko write that economic factors involve material motivation, that is, orientation towards the implementation of certain indicators or tasks, receiving financial rewards for the results of work after their implementation. The incentive system should be simple, understandable and flexible for employees. The amount of reward should be rational both

financially and psychologically. The incentive system should give employees a sense of fairness in material rewards and help increase their interest not only in improving their personal work, but also in improving business relations with other employees. Personnel motivation should be comprehensive and systematic to achieve work efficiency (Hrynko, Hviniashvili, & Shynkarenko 2021: 66).

The study showed a clear dualism of the motivational profile of a modern employee. Along with financial pragmatism, there is an acute need for professional self-realization, achievement of complex goals and personal growth. According to A. Maslow's motivational theory, one can trace the simultaneous actualization of both the basic (physiological) level and the highest level – self-actualization. This proves that for employees not only the financial component is important, but also professional development. If a workplace offers a high salary but does not provide opportunities for learning, creativity, and recognition of achievements, such an employee quickly loses interest in the results of work, which often leads to emotional burnout and staff turnover (Maslow, 1943: 372–383).

Effective personnel management in modern conditions is impossible without the use of complex methods that combine financial incentives and psychological support. Based on our research, which confirmed the dominance of instrumental motivation (80%), the high importance of the needs for professional realization (63%) and self-development (54%), it is possible to form a system of methods that covers four key areas: economic, socio-psychological, developmental and organizational. The main goal of these methods is to create an environment where the employee's personal goals coincide with the company's objectives.

Economic methods are an important component of the management model, but their content must constantly change. Since the financial factor is a priority for most respondents, a regular salary no longer stimulates people to work better, it only ensures their presence in the workplace. To really improve results, it is necessary to implement flexible payment systems, where bonuses clearly correspond to performance indicators (KPI).

The first step is to implement a transparent bonus system. Each employee should understand how his personal contribution affects the amount of compensation. This creates a sense of fairness: a person sees a direct correlation between efforts and money. For example, the use of quarterly bonuses for the implementation of specific projects allows you to maintain a high pace of work throughout the year.

The second important tool is profit-sharing programs. This is a method in which a portion of the company's profits is distributed among employees based on their length of service or performance. This approach turns the employee into a partner who is interested in the financial success of the entire enterprise. This significantly increases the loyalty of the core workforce and reduces staff turnover.

The third component is the benefits package (the “cafeteria of benefits”). Since people’s needs are different, the company can offer a choice: health insurance, tuition reimbursement, gym membership, or travel reimbursement. When the employee chooses the benefits they need, the subjective value of such compensation increases.

Social-psychological methods help satisfy the needs for recognition and success, which are very important for professionals aged 25–40. According to the results of the study, the Recognition scale is one of the leading (43% of dominant responses).

Managers should implement a culture of gratitude. It doesn’t require financial costs, but it has a huge impact. When an employee sees that their work is appreciated, they are willing to put in more effort in the future.

Another tool is the provision of autonomy. The ability to make decisions independently within the limits of one’s duties is the highest form of trust. For ambitious employees, control over every step is demotivating. In contrast, the right to choose the methods of completing tasks allows a person to feel responsible for the result. This directly satisfies the need for power and influence, even if the employee does not hold a management position.

It is also important to work on the psychological climate. Regular informal meetings, joint celebrations of successes and the absence of competition allow people to feel safe. Social support from colleagues helps in difficult times.

Developmental methods respond to the high demand of personnel for self-development. The modern economy is characterized by a rapid pace of development, so training becomes not just a privilege, but a necessity.

Companies are encouraged to create individual career development plans so that employees are more aware of the prospects for their future.

Paying for professional courses, training, and certifications is a powerful form of reward. When an organization invests in an employee's education, it gets a more qualified specialist. At the same time, the employee perceives this as an investment in his personal capitalization. This creates a strong bond between the specialist and the company, as the person feels grateful for the opportunities provided.

Also effective is the method of personnel rotation and "horizontal career". If an employee has achieved career growth in his position, he can be offered new tasks in a related department. This prevents routine and professional burnout, allowing a person to gain new experience without changing his place of work.

Organizational methods aim to create a comfortable space where nothing interferes with work. Research has shown that rigid discipline and bureaucracy are perceived negatively. Modern staff value flexibility.

Flexible schedules and the ability to work remotely are no longer a luxury, but a requirement of time. This allows people to better combine work and personal life. This approach is based on trust: the manager controls the result, not the time spent in the office. As practice shows, employees on a flexible schedule often work more efficiently, because they choose their own working hours.

An important role is played by the ergonomics of the workplace. Comfortable furniture, modern equipment, good lighting and the presence of a relaxation area directly affect the physical condition and mood. If the office is comfortable, a person gets tired less and can maintain concentration longer. For 26% of respondents, working conditions are a dominant factor, so this point cannot be ignored.

Also, organizational methods include optimizing document flow. Minimizing paperwork and implementing digital tools free up time for creative tasks. This reduces irritation from routine and increases the overall speed of business processes.

According to the work of O. Ilyash and M. Kaperyz, the main strategic directions for improving the effectiveness of the applied methods of increasing motivation are: improving the structure of existing material and non-material incentives, reforming wages; social security of employees based on investments in their development; attracting the potential of social partnership, improving the collective bargaining regulation of labor and its payment; introducing an assessment of the effectiveness of the motivational mechanism of personnel use. At the same time, the process of applying progressive forms of motivation at the enterprise should be reduced to systematic planning of the success of motivational activities, studying the positive results obtained, developing new methods aimed at achieving high productivity on the basis of motivational personnel management. The implementation of the proposed measures is possible provided that the enterprise has one or a group of specialists who study the issue of increasing labor productivity on the basis of motivation. It is also important to maintain feedback from management to employees to track changes in their motivational structure, which will further allow for a prompt response to changes in the market environment in which enterprises operate. (Iliash & Kaperiz, 2011: 170).

In conclusion, it is worth noting that the effectiveness of motivation depends on consistency. No method will give long-term results if it is used separately. It is necessary to combine economic benefits with psychological factors.

As O. Ilyash and M. Kaperiz note, increasing motivation in the labor potential management system should be a constant process. It is impossible to set up the system once and forget about it. The market is changing, people's needs are evolving, so management should regularly review the employee motivation system. (Iliash & Kaperiz, 2011: 169).

A comprehensive combination of financial compensation, training opportunities, and respect for the individual creates a comfortable working environment. When a company invests in people, people invest their time in the success of the company. This approach promotes long-term cooperation and high work efficiency.

The practical value of the obtained data for modern management is to use the research results to create effective methods for increasing employee motivation. For example, the motivating effect of material incentives can be greatly enhanced if combined with the employee's career growth. Low interest in power (only 17%) and work structure among respondents indicates that classic bureaucratic management models are losing their effectiveness. Modern employees value flexibility, partnership with management, and focus on results rather than processes.

Prospects for further scientific research in this direction consist in conducting a deeper comparative analysis of motivational profiles and levels of job satisfaction, taking into account length of service, gender characteristics, and the specifics of the industry in which the subjects work. In addition, it is considered promising to study the direct impact of the identified dominant motives on the indicators of production productivity of enterprises.

Conclusions. Theoretical and empirical analysis of the psychological features of personnel motivation showed that the system of motivational motives of a modern employee is multicomponent. Solving the tasks set in the study, it was established that the absolute priority in the structure of needs is material reward (instrumental motivation). This factor was identified as dominant for 80% of the studied, which is due to the current socio-economic needs of the age group 25–40 years. The powerful significance of internal driving factors that operate in parallel with financial interests was revealed. In particular, the needs for professional achievements (63%) and personal self-development (54%) form the core of the internal concept of the "I" of a modern specialist. This indicates a high level of professional awareness of the staff, who strive to complicate tasks and improve their own qualifications. Effective management of labor potential in a modern enterprise requires an individual approach from management. The strategy for retaining and stimulating personnel should be based on a combination of competitive wages with wide opportunities for professional realization, recognition of work results and a comfortable microclimate in the team. A comprehensive combination of material and psychological incentives will help ensure maximum employee engagement and stable development of the enterprise in a competitive environment.

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DOI https://doi.org/10.30525/2592-8813-2026-2-53

MEDIATION IN THE RELIGIOUS SPHERE: MYTH OR REALITY?

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Abstract. The purpose of the article is to determine the possibilities and limitations of applying mediation as an alternative dispute resolution mechanism within religious organizations in Ukraine. The study is based on the analysis of Ukrainian legislation, statutory documents of religious organizations, and scholarly approaches to mediation and religious conflict resolution. The article examines the specific nature of religious conflicts, existing mechanisms of conflict resolution in religious organizations, and the potential of mediation in this field. It is argued that religious mediation may be effective in disputes concerning communication within communities, property use, interpersonal tensions, and interfaith cooperation, while its application is limited in cases involving dogmatic issues, canonical jurisdiction, or the absence of voluntary participation. The practical significance of the study lies in the formulation of recommendations for the implementation of mediation practices in the religious sphere.

Key words: mediation, religious sphere, psychological conditions, conflict, alternative dispute resolution methods (ADR), nonviolent communication, facilitation, conflict prevention.

Introduction. Throughout the entire period of Ukraine's independence, religious organizations have played a significant role in the life of Ukrainian society, particularly during periods of political, economic, and social crisis. For this reason, religious organizations consistently occupy high positions in public trust surveys. According to the Razumkov Centre's 2025 data, more than 65% of Ukrainians trust churches and religious organizations, which is one of the highest indicators among all social institutions both in Ukraine and in Europe. It is noteworthy that even in times of social upheaval, this level of trust remains consistently high, underscoring the importance of religious institutions in the lives of Ukrainians.

It should be noted that religious life in Ukraine is distinguished by its diversity, in which various confessional traditions are intertwined, reflecting cultural, social, and geopolitical characteristics. An analysis of current data on the network of religious organizations makes it possible to gain a deeper understanding of the contemporary state of religious life in Ukraine and its potential influence on social processes. According to the official report of the State Service of Ukraine for Ethnopolitics and Freedom of Conscience, as of 1 January 2025, a comprehensive analysis of the structure of religious organizations in Ukraine was conducted (State Service of Ukraine for Ethnopolitics and Freedom of Conscience, 2025).

The analysis of statistical data on the network of religious organizations in Ukraine as of 1 January 2025 allows for several important conclusions regarding the confessional structure of Ukrainian society.

Traditionally, Orthodox churches remain dominant in Ukraine. They are represented by 19,503 organizations, accounting for more than 52% of the total number of religious organizations in the country. Protestant churches rank second in terms of the number of organizations, with 10,932 entities, representing approximately 30% of the total. Catholic churches occupy third place, with 5,295 organizations, amounting to approximately 14% of the total number. Other religious denominations, including Muslim organizations, with 634 entities, Jewish organizations, with 507 entities, and Eastern religions, with 29 entities, together account for less than 4% of the total number of religious organizations (State Service of Ukraine for Ethnopolitics and Freedom of Conscience, 2025).

The functioning of religious organizations in Ukraine also has its own specific features, determined both by internal canons and traditions and by state regulation. Religious organizations have the right to conduct worship services, religious rites and ceremonies, establish educational institutions for the training of clergy, and engage in charitable activities (Verkhovna Rada of Ukraine, 1991).

The purpose of this article is to determine the possibilities and limitations of applying mediation as an alternative dispute resolution mechanism within religious organizations in Ukraine. The scientific novelty of the article lies in the attempt to conceptualize religious mediation as a specific form of alternative dispute resolution that combines legal, psychological, communicative and theological dimensions. The study is based on the analysis of Ukrainian legislation, statutory documents of religious organizations, and scholarly approaches to mediation and religious conflict resolution.

Methodology. The study is based on a combination of general scientific and special research methods, including analysis, synthesis, comparative legal analysis, content analysis of statutory documents of religious organizations, and interdisciplinary interpretation of mediation practices in the religious sphere.

The Concept and Fundamental Principles of Mediation

Mediation is an alternative method of conflict resolution that involves the participation of a neutral third party – the mediator – who assists the parties in reaching a mutually acceptable solution. In international practice, mediation is recognized as an effective instrument for out-of-court dispute resolution, contributing to reducing conflict levels in society and conserving judicial resources (Strange, 2020). The study of theoretical and conceptual aspects shows that the institution of mediation occupies an important place in the modern socio-legal space as an effective alternative to traditional litigation. (Basenko et al., 2022: 93).

Modern legislation defines the fundamental principles on which the mediation procedure is based. Article 3 of the Law of Ukraine "On Mediation" provides the following: "The mediation procedure shall be conducted by mutual consent of the parties based on the principles of voluntariness, confidentiality, cooperation and equality of the parties, as well as the impartiality and independence of the mediator" (Verkhovna Rada of Ukraine, 2021). The implementation of these legislative standards is due to the urgent social need to form a culture of peaceful dispute resolution. (Kalmykova, 2023: 70).

The foundational principle is voluntariness. Mediation may begin only upon the mutual consent of the parties to resolve the dispute. Another important principle of mediation is confidentiality. Observance of this principle makes it easier for the parties to agree to mediation, as it allows them to preserve their reputations in the eyes of others while keeping their interests private.

The next principle is the equality of the parties and their equal standing. This means that the participants in the dispute have equal rights. The mediator gives equal attention to all parties, regardless of their social status, and provides equal opportunities to each participant (Verkhovna Rada of Ukraine, 2021).

The entire mediation process is carried out based on the mediator's neutrality. The mediator must demonstrate impartiality toward the parties to the conflict, maintain equal distance from them, and remain free from emotional bias or material temptation. The mediator also applies the principles of responsibility and transparency. They create an atmosphere of trust, adhere to the procedural rules, and inform the parties about the course of the process.

The parties to the conflict bear responsibility for their own conflict and for making the final decision. Mediation is applied in those spheres of life where social changes and societal transformations have created the need to find alternative ways of resolving conflicts, distinct from older traditional methods (Verkhovna Rada of Ukraine, 2021).

Established Mechanisms of Conflict Resolution in Religious Organizations

The governance structures and conflict-resolution mechanisms of religious organizations in Ukraine reflect their theological understanding of the Church, historical traditions, and practical needs.

Orthodox churches – the Orthodox Church of Ukraine and the Ukrainian Orthodox Church – have similar hierarchical structures, characterized by a strong role of the episcopate and formalized judicial procedures. The specifics of the internal judicial proceedings and canonical administration of these institutions are clearly regulated by the relevant regulatory documents and canons (Statute on the governance of the Ukrainian Orthodox Church, 2022).

The Ukrainian Greek Catholic Church combines Eastern synodality with Western institutionalism, which is reflected in a well-developed system of ecclesiastical tribunals and a clear codification of canon law (Ukrainian Greek Catholic Church, 2014).

The All-Ukrainian Union of Churches of Evangelical Christian Baptists demonstrates a more congregationalist approach, with significant autonomy of local communities and a preference for informal methods of conflict resolution.

There is a tendency toward less formalized conflict-resolution procedures in all religious organizations, which is connected with the growing openness of church life and the need to meet contemporary standards of transparency and accountability.

Challenges and Opportunities in the Field of Religious Mediation

Despite its considerable potential, religious mediation faces some specific challenges in society that require a systematic approach to their resolution, namely:

a. the complexity of combining religious and secular approaches to conflict resolution;

b. the importance of taking into account the hierarchical structure of religious organizations, interreligious differences, and theological contradictions

c. the emotional and spiritual intensity of religious conflicts (Padilla, 2014).

The Potential and Opportunities of Religious Mediation

Recognizing the problems outlined above, religious mediation possesses significant potential and unique opportunities, namely:

a. deep historical traditions of reconciliation within religious communities;

b. a high level of trust in religious institutions and their leaders;

c. the use of preventive mediation and the promotion of peace (Matthews-Giba, 2000: 1700-1705).

Recommendations for the Implementation of Religious Mediation

For the effective implementation and development of mediation in the religious sphere, detailed recommendations are proposed. These recommendations encompass the training of specialized mediators, the creation of systems of cooperation between religious organizations and professional mediators, and the development of an appropriate methodological framework.

These recommendations should take into account the specific nature of the religious context and should be aimed at integrating spiritual practices of reconciliation with modern mediation techniques. Successful implementation of these recommendations will contribute to the formation of a culture of peaceful conflict resolution and to increasing the effectiveness of mediation in religious communities (Matthews-Giba, 2000: 1705-1710).

Religious mediation may be especially effective in disputes concerning communication within communities, property use, interpersonal tensions between clergy and parishioners, and interfaith cooperation. However, it may be limited in cases involving dogmatic issues, canonical jurisdiction, or conflicts where one party refuses voluntary participation.

Accordingly, the following sets of measures are proposed for addressing the identified tasks:

Development of comprehensive educational courses: A specialized program should be developed that combines classical mediation methods with religious traditions, canonical norms and practices, and the specifics of conflict resolution.

Such programs should include the study of religious texts and documents related to reconciliation, theological interpretations of conflict, peacemaking practices, and practical cases from the religious sphere.

Involving religious leaders and administrators in the process of training mediators: Cooperation with religious authorities ensures the authority and legitimacy of training programs in the eyes of religious communities. Religious leaders can provide useful knowledge about the specifics of religious conflicts and traditional approaches to their resolution.

Formation of interdisciplinary teaching teams: Such teams should include both professional mediators and representatives of religious communities in order to ensure a comprehensive approach to mediator training in the religious sphere (Padilla, 2014).

Development of specialized modules on interfaith and interreligious mediation: Preparing mediators to work in conflict situations between different religious groups requires special attention to intercultural communication, religious tolerance and interfaith understanding. The proposed recommendations for the implementation of religious mediation create a comprehensive basis for the effective development of this direction in the religious environment of Ukraine.

The combination of the traditions of reconciliation that exist in different religions with modern mediation methods opens up new opportunities for dialogue and understanding between confessions. Such an approach will contribute not only to the resolution of intra-religious disputes but also to the harmonization of social relations in general.

Conclusions. The conducted research allows us to draw several important conclusions regarding the development of religious mediation. This unique practice combines ancient spiritual traditions with modern approaches to conflict resolution, opening up opportunities for a deep dialogue built on mutual respect and understanding of religious worldviews.

The analysis revealed both challenges and prospects in this area, which made it possible to formulate specific recommendations. Their implementation will contribute to the creation of an effective system of religious mediation in Ukraine, which will help not only resolve intra-confessional disputes but also play an important role in resolving broader social conflicts, especially in regions where religion is a key element of the identity of communities.

Therefore, religious mediation should be understood not as a universal mechanism for resolving all religious disputes, but as a complementary tool that can be effectively applied in conflicts where voluntary participation, dialogue, confidentiality and mutual recognition of interests are possible.

Mediation in a religious environment is an opportunity, a challenge, and a gift, because a dispute can be transformed into a process of revelation and love, as the classic of German philosophy, Schelling, notes: “Every being can reveal itself only in its opposite. Love only in hatred, unity only in conflict.”

Thus, the development of religious mediation is not only an internal matter of religious communities, but also an important component of building a peaceful and harmonious society capable of constructively resolving conflicts and promoting dialogue between different population groups.

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DOI https://doi.org/10.30525/2592-8813-2026-2-54

THE PSYCHOLOGICAL WELL-BEING OF STUDENTS AND TEACHERS IN THE CONTEXT OF A SAFE DIGITAL ENVIRONMENT

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Abstract. This article examines the issue of ensuring the psychological well-being of learners and educators in the context of creating a safe digital educational environment. The relevance of this research stems from the rapid digitalisation of education, the widespread adoption of distance and blended learning, and the need to establish safe conditions for educational interaction in the digital space. The regulatory and international foundations for creating a safe digital environment are examined, and the role of digital competence, information literacy and digital ethics in ensuring the psychological safety of participants in the educational process is identified. The main digital risks, in particular cyberbullying, information overload and digital addiction, are analysed. It has been established that the creation of a psychologically safe digital environment contributes to the maintenance of emotional well-being, the development of digital culture and the enhancement of the effectiveness of the educational process.

Key words: psychological well-being, safe digital environment, digitalisation of education, digital competence, learners, teacher.

Introduction. The current stage of development in the education system is characterised by the active digital transformation of the educational environment, the integration of information and communication technologies into the learning process, and the expansion of opportunities for distance and blended learning. In such circumstances, the issue of ensuring the psychological well-being of learners and educators in the context of creating a safe digital environment takes on particular significance. The digitalisation of education creates new opportunities for organising the educational process, accessing information resources, developing digital competence and ensuring the continuity of learning; however, it simultaneously gives rise to a number of new challenges related to psychological safety, emotional well-being and the protection of participants in the educational process from digital risks. An analysis of scientific research suggests that, in the context of the modern information society, the digital educational environment is becoming an integral part of teachers' professional practice and the educational activities of learners (Shulha, 2023). The use of online platforms, social networks, digital services, cloud technologies, video conferencing and interactive educational resources is significantly altering the nature of interpersonal interaction within the educational space. Alongside the positive aspects of digitalisation, such as access to education, learning mobility and the personalisation of the educational process, issues such as information overload, digital addiction, cyberbullying, psychological exhaustion, emotional instability and a

decline in the psychological well-being of those involved in the educational process are becoming increasingly pressing.

Under the Law of Ukraine 'On Education', every learner has the right to a safe educational environment, free from violence, discrimination, psychological pressure and any form of threat. In today's context, the concept of a safe educational environment has expanded significantly and encompasses not only the physical space of the educational institution but also the digital environment in which educational interaction takes place. The National Strategy for the Development of a Safe and Healthy Educational Environment and the Concept of Safety in Educational Institutions emphasise the need to foster a culture of safety, develop mechanisms to prevent bullying, cyber threats and psychological violence, and create an effective system to support the psychological well-being of those involved in the educational process. In the international educational sphere, the issue of ensuring a safe digital environment also occupies an important place. Documents from UNESCO, UNICEF, the World Health Organisation, and the international initiatives 'Safe to Learn Initiative' and 'Comprehensive School Safety Framework' define the safety of the educational environment as a comprehensive system of interaction between physical, psychological, social and digital factors aimed at protecting the rights, health and well-being of all participants in the educational process. Therefore, digital safety is viewed not only as the technical protection of information, but also as the creation of a psychologically comfortable environment for learning, professional activity and interpersonal interaction.

The issue of the psychological well-being of those involved in the educational process takes on particular relevance in the context of social instability, martial law and the crisis-driven transformations of contemporary Ukrainian society. Military operations, forced displacement of the population, constant information pressure, emotional exhaustion and anxiety have a significant impact on the psychological state of learners and educators. In such conditions, the digital educational environment often becomes not only a tool for organising learning, but also a space for psychological interaction, support and social communication. At the same time, the active use of digital technologies is accompanied by the emergence of new risks to an individual's psychological well-being. An analysis of scientific research suggests that among the most common threats of the modern digital environment are cyberbullying, information overload, digital addiction, manipulative content, breaches of digital ethics, online aggression, emotional burnout and a decline in the level of interpersonal communication. Such phenomena can have a negative impact on students' emotional state, their level of academic motivation, psychological resilience and the effectiveness of educational activities.

An analysis of academic research and my own teaching experience leads to the conclusion that psychological well-being is regarded as an integrative characteristic of the individual, encompassing emotional well-being, psychological stability, the capacity for self-actualisation, a positive perception of oneself and one's surroundings, as well as a sense of security and social support. For educators, psychological well-being is directly linked to professional effectiveness, stress resilience, emotional state, and the ability to interact productively with learners. For students, psychological comfort is a key prerequisite for successful learning, the development of motivation, the formation of social skills, and adaptation to the digital educational environment (Shulha, 2023).

In contemporary scientific and pedagogical literature, a safe digital educational environment is defined as a systemic characteristic of the educational space that combines informational, psychological, social, technological and managerial conditions, within which the individual is protected from digital risks, psychological comfort is maintained, and conditions are created for the harmonious development of participants in the educational process. An important component of such an environment is the development of digital culture, information literacy, safe online behaviour skills and emotional intelligence.

It is worth noting that effectively promoting psychological well-being in a digital educational environment requires a comprehensive approach that involves the integration of pedagogical, psychological, IT and managerial mechanisms. Of particular importance is the development of teachers' digital competence, the introduction of psychological support technologies, the use of interactive educational platforms, the creation of systems for monitoring the psychological well-being of learners, and the fostering of a culture of safe digital communication. Furthermore, there is a growing need to develop new pedagogical strategies aimed at fostering psychological resilience among participants in the educational process, developing self-regulation skills, emotional literacy and the responsible use of digital technologies. In today's context, a safe digital environment must ensure not only the protection of information but also the creation of an atmosphere of trust, support, psychological comfort and constructive interaction among all stakeholders in education.

To summarise, the issue of ensuring the psychological well-being of learners and educators in the context of a safe digital environment is highly relevant and requires comprehensive interdisciplinary research. Its significance stems from the need to create an effective system of psychological support for participants in the educational process amidst the digital transformation of education, societal challenges and global changes in the modern information society.

The purpose of the study is to provide a theoretical justification of the nature of a safe digital educational environment and to analyse its impact on the psychological well-being of learners and educators, as well as to identify effective pedagogical and psychological conditions for ensuring the psychological safety of those involved in the educational process in the context of the digitalisation of education.

Main section. To achieve the stated objective, the following research tasks have been identified:

– To examine the regulatory, legal and international foundations for the creation of a safe digital educational environment.

– To substantiate the pedagogical and psychological conditions for ensuring the psychological well-being of participants in the educational process within a safe digital environment.

– To determine the role of digital competence, information literacy and digital ethics in the creation of a psychologically safe educational environment.

Materials and methods. The research involved the comprehensive application of competence-based, systemic and interdisciplinary scientific approaches, which ensured a holistic analysis of the research topic. Their integration made it possible to thoroughly examine psychological and pedagogical sources, in particular monographs, scientific articles, dissertations and contemporary scientific works devoted to the chosen topic. This approach facilitated a deeper understanding of the theoretical and methodological foundations of the research and the identification of the specific features of scientific concepts, approaches and perspectives regarding the problem under investigation.

Results and discussion. The creation of a safe digital educational environment is one of the key priorities for the development of the modern education system in the context of the global digitalisation of society. The relevance of researching this issue stems from a number of social, technological and educational factors. First and foremost, modern education systems require modernisation in line with the 'Education 4.0: Ukrainian Dawn' concept, which is based on the integration of digital technologies, artificial intelligence, automation, cloud services and intelligent educational platforms into the learning process. In such conditions, the creation of a secure digital space takes on particular significance, ensuring not only the effectiveness of educational activities but also the psychological comfort and protection of all participants in the educational process. An important factor in bringing this issue to the fore was the COVID-19 pandemic, which led to a rapid transition by educational institutions to distance and blended learning. This process has demonstrated the significant potential of digital technologies to ensure the continuity of education; however, it has also revealed a number of problems related to cybersecurity, digital inequality, psychological overload, online violence and

the insufficient level of digital competence among participants in the educational process. That is why the issue of regulatory and legal safeguards for a secure digital environment has become one of the key priorities of state education policy.

In Ukraine, the fundamental principles for creating a safe digital educational environment are set out in the Law of Ukraine 'On Education', under which every learner has the right to safe and non-harmful learning conditions, and to protection from all forms of violence, discrimination and humiliation. In today's context, these provisions also apply to the digital educational space, where a significant part of educational interaction takes place. Other important regulatory documents include the Concept of Safety in Educational Institutions and the National Strategy for the Development of a Safe and Healthy Educational Environment in the New Ukrainian School. These documents emphasise the need to foster a culture of digital safety, prevent cyberbullying, develop digital literacy, provide psychological support to those involved in the educational process, and establish an effective system for responding to digital threats.

Of particular importance for the development of the digital educational environment are the state initiatives 'Digital Education' and 'Digital Transformation of Education and Science', which identify digital competence as one of the key competencies of the modern teacher and learner. These strategies provide for the development of digital infrastructure in educational institutions, the introduction of online platforms, interactive educational resources, e-learning systems and digital tools to support the educational process.

At the international level, the issue of creating a safe digital environment is addressed in a number of documents and programmes produced by UNESCO, UNICEF, the World Health Organisation and the Council of Europe. In particular, the international initiatives 'Safe to Learn Initiative' and 'Comprehensive School Safety Framework' view the safety of the educational environment as a comprehensive system of interaction between physical, psychological, social and digital components. UNESCO documents emphasise that a safe digital educational environment must ensure the protection of personal data, the digital rights of those involved in the educational process, safe online communication, and the psychological well-being of learners and educators. Significant attention is paid to the development of digital literacy, media literacy and critical thinking skills as essential conditions for countering disinformation, manipulation and digital risks. In the European educational landscape, the DigComp and DigCompEdu digital competence frameworks serve as key guidelines, defining the core digital skills for educators and learners, including the safe use of digital technologies, ethical behaviour in the online environment, and the protection of psychological well-being.

We define digital competence as an individual's ability to use digital technologies effectively, safely and responsibly in educational, professional and social contexts. A high level of digital competence enables learners and educators to evaluate information critically, adhere to cybersecurity rules, protect personal data and avoid digital threats. Furthermore, well-developed digital skills help to reduce anxiety and psychological stress when working with digital resources, which has a positive impact on the psychological well-being of those involved in the educational process. Information literacy plays a key role in creating a safe digital environment; it involves a responsible attitude towards information, adherence to the principles of academic integrity, critical thinking, and the ability to counter disinformation and manipulative content. A well-developed information culture helps to foster skills for the conscious consumption of information and reduces the negative impact of information overload on an individual's emotional state. Digital ethics is no less an important component of a psychologically safe educational environment. It encompasses norms of behaviour in the online environment, principles of tolerant communication, mutual respect and the responsible use of digital technologies. Adherence to digital ethics helps prevent cyberbullying, online aggression, discrimination and other forms of psychological violence on the internet.

The active introduction of digital technologies, distance and blended learning, and the use of online platforms and social media are significantly changing the nature of educational interaction and affecting the emotional well-being of those involved in the educational process. This is precisely why it is crucial to create pedagogical and psychological conditions that ensure psychological safety, emotional comfort and support for personal development in the digital educational environment:

1. One of the key conditions for ensuring psychological well-being is the creation of a psychologically safe digital educational space. According to C. Ryff's concept of psychological well-being, an individual's psychological well-being encompasses self-acceptance, positive relationships, autonomy, the capacity for self-actualisation, and a sense of control over one's environment (Ryff, Singer, 2013). In the context of the digital educational environment, this means creating conditions in which learners and educators feel emotionally secure, supported and able to communicate safely.

2. An important pedagogical condition is the development of digital competence among participants in the educational process. Researchers emphasise that well-developed digital skills not only contribute to improved academic performance but also have a positive impact on psychological well-being. In particular, a study by J. Gonzalez-Vasquez (Gonzalez-Vasquez, 2025) notes that the development of digital competences enhances students' ability to adapt to the digital environment, reduces anxiety and contributes to the development of their psychological resilience. It is emphasised that the development of media literacy, critical thinking skills and safe online behaviour is of paramount importance.

3. Another important factor is ensuring pedagogical support and positive communication between those involved in the educational process. Research by K. Hellfeldt, L. López-Romero and H. Andershed (2019) demonstrates that social support from teachers and families significantly reduces the negative impact of cyberbullying on the psychological well-being of learners and contributes to an increase in subjective well-being. This highlights the need to foster an atmosphere of trust, collaborative interaction and psychological support within the digital educational environment.

4. An important psychological consideration is the prevention of cyberbullying, digital aggression and information overload. Recent research confirms that cyberbullying negatively affects the psycho-emotional state of students, causing anxiety, depressive symptoms, reduced self-esteem and academic motivation (Kowalski et al., 2013). In this regard, educational institutions must implement systems for monitoring digital risks, psychological support programmes and mechanisms for responding to instances of online violence.

5. Equally important is adherence to the principles of digital ethics and the culture of online communication. Fostering a culture of safe behaviour in the digital environment involves developing skills in the responsible use of digital technologies, tolerant interaction and emotional self-control. It is digital ethics that ensures the creation of a favourable psychological climate in the online space and minimises the risks of conflict situations.

6. The use of adaptive digital platforms and interactive educational technologies also plays a significant role in ensuring psychological well-being. The digital educational environment can have a positive impact on students' psychological well-being provided a comfortable information space is created and personalised educational technologies are used, whilst interactive digital tools allow for individualised learning, reduce stress levels and ensure a smoother adaptation to the educational process.

7. An important prerequisite is the development of emotional intelligence, psychological resilience and self-regulation skills among those involved in the educational process. In an environment of information overload and constant digital interaction, the ability to control one's emotional state, manage stress and maintain emotional balance is a key factor in psychological well-being.

To summarise the above, ensuring the psychological well-being of learners and educators in a safe digital environment requires a comprehensive combination of pedagogical, psychological and organisational conditions. The effective functioning of the digital educational space is possible

provided that digital competence is developed, an atmosphere of psychological support is created, digital risks are prevented, digital ethics are observed, and modern technologies for the psychological support of participants in the educational process are implemented.

Conclusion. This study provides a theoretical justification of the nature of a safe digital educational environment and analyses its impact on the psychological well-being of learners and educators in the context of the digitalisation of modern education. It has been established that a safe digital environment is an important component of the modern educational space and encompasses a system of psychological, informational, pedagogical, organisational and technological conditions aimed at ensuring comfortable and safe interaction between participants in the educational process. The study analysed the regulatory and international foundations for the creation of a safe digital educational environment. It has been determined that Ukraine's current state education policy, as well as international documents from UNESCO, UNICEF and the World Health Organisation, emphasise the need to create a safe digital space, develop digital literacy, prevent cyberbullying and provide psychological support to participants in the educational process. It has been demonstrated that the digitalisation of education requires not only technical support for the educational process, but also the development of a system of psychological safety within the digital environment. The pedagogical and psychological conditions for ensuring the psychological well-being of learners and educators have been substantiated. It has been established that key factors in creating a psychologically safe digital environment include fostering an atmosphere of support and trust, developing psychological resilience, mitigating digital risks, utilising interactive technologies, and implementing psychological support mechanisms in the context of distance and blended learning.

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THEORY AND PERSPECTIVES OF PHILOLOGY

DOI https://doi.org/10.30525/2592-8813-2026-2-55

LINGUISTIC APPROACHES TO SELFHOOD AND CULTURAL IDENTITY FORMATION IN LITERARY DISCOURSE

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Abstract. This article examines the linguistic construction of selfhood and cultural identity in contemporary literary discourse through "How to Be Both", "Frankissstein", and "Girl, Woman, Other". Drawing on discourse analysis, sociolinguistics, narrative linguistics, and cultural identity theory, the study investigates how language shapes fragmented, fluid, and multicultural identities in contemporary fiction. The research focuses on narrative structure, polyphony, code-switching, gendered discourse, and intersubjective communication as linguistic mechanisms of identity formation. The article argues that literary discourse functions as a dynamic space where cultural memory, gender performativity, and social belonging are continuously negotiated through language. By analyzing contemporary experimental narrative techniques, the study demonstrates that identity in modern literature is represented not as stable or fixed, but as discursively constructed, hybrid, and constantly evolving within cultural and ideological contexts.

Key words: sociolinguistics, queer linguistics, literary discourse, cultural identity, narrative linguistics.

Introduction. In contemporary literary and linguistic studies, the relationship between language, selfhood, and cultural identity has become one of the central areas of interdisciplinary research. Rapid globalization, migration, multicultural interaction, and technological transformation have significantly influenced the ways individuals construct and express identity through language. Within this context, literary discourse functions not only as an artistic representation of reality, but also as a linguistic and cultural space where identities are negotiated, fragmented, reconstructed, and performed. Contemporary fiction increasingly challenges traditional notions of stable identity and presents selfhood as fluid, hybrid, and discursively produced.

The present study explores linguistic approaches to selfhood and cultural identity formation in contemporary literary discourse through the analysis of How to Be Both by Ali Smith, Frankissstein by Jeanette Winterson, and Girl, Woman, Other by Bernardine Evaristo. These works were selected because they represent diverse perspectives on fragmented identity, gender performativity, multicultural belonging, and postmodern subjectivity. Through experimental narrative structures, polyphonic voices, code-switching, and hybrid discourse forms, the novels demonstrate how language actively participates in the formation of individual and collective identities.

Previous studies have examined the subversion of traditional gender norms in English literature (Aghabayli, 2024, p. 232) and the distinctive feminist perspectives of twentieth-century British women writers with regard to gender representation. (Aghabayli, 2024, p.4007) Previous research has shown that gender norms in English literature are frequently destabilized through feminist narrative strategies (Aghabayli, 2024, p. 235). Building on this research trajectory, the present study extends the analysis from thematic representations of gender to a more linguistically oriented framework of identity construction. Rather than focusing solely on ideological or thematic critique, this article investigates how linguistic and discursive mechanisms, such as narrative voice, pronoun usage, and sociolinguistic variation, contribute to the formation of selfhood and cultural identity in literary dis-

course. (Aghabayli, 2024, p.4009) In doing so, it develops a more comprehensive interdisciplinary approach that integrates feminist literary criticism with discourse analysis, sociolinguistics, and queer linguistics.

The article draws upon discourse analysis, sociolinguistics, narrative linguistics, queer linguistics, and cultural identity theory to investigate how linguistic choices shape representations of selfhood and belonging. Particular attention is paid to narrative fragmentation, intersubjectivity, dialogism, gendered discourse, and multilingual expression as mechanisms of identity construction. The study argues that contemporary literary discourse reflects the complexity of modern identity by portraying the self not as fixed or unified, but as continuously constructed through language, culture, memory, and social interaction.

Discussion. The analysis of How to Be Both, Frankissstein, and Girl, Woman, Other demonstrates that cultural identity in contemporary literary discourse is fundamentally constructed through linguistic and narrative practices rather than expressed as a fixed essence. Across the three novels, language operates as a dynamic mechanism through which selfhood is fragmented, negotiated, and repositioned within shifting cultural and ideological contexts.

One of the central findings is that narrative structure plays a crucial role in shaping identity. In *How to Be Both*, the dual narrative and temporal displacement destabilize linear identity formation, producing a polyphonic textual space where subjectivity emerges through shifting perspectives. This supports narrative linguistic theories that view identity as constructed through storytelling rather than pre-existing reality.

In *Frankissstein*, linguistic experimentation foregrounds the instability of gendered identity. The use of non-binary pronouns and hybrid self-descriptions challenges grammatical norms that traditionally encode binary gender structures. From a queer linguistic perspective, the novel demonstrates how language simultaneously reflects and reproduces ideological constraints, while also offering possibilities for resistance and re-signification. Dialogic interactions further expose ideological tensions between normative and non-normative identity constructions.

In *Girl, Woman, Other*, sociolinguistic variation becomes a primary marker of cultural identity. The novel's use of multiple voices, vernacular speech, and rhythmic prose reflects the heterogeneity of Black British female experiences. Identity is linguistically indexed through register, dialect, and narrative voice, highlighting intersections of race, gender, class, and migration. This aligns with sociolinguistic and cultural linguistic approaches that emphasize the role of language variation in identity formation.

Comparatively, all three texts illustrate that identity is not linguistically neutral; rather, it is shaped through discourse, representation, and interaction. While Smith emphasizes fragmentation, Winterson foregrounds gender fluidity and posthuman subjectivity, and Evaristo highlights intersectional and communal identity formation. Together, they demonstrate that contemporary literary discourse functions as a site where cultural identity is continuously produced, contested, and reimagined through language.

Hajiyeva (2024; 2024) examined the relationship between literary discourse, reader engagement, and the construction of ideological and imaginative frameworks in contemporary fiction, particularly focusing on how narrative forms influence perceptions of identity, agency, and social positioning. These studies also emphasize the role of literature in shaping critical awareness of cultural and ideological boundaries through textual representation. (Hajiyeva, 2024, p.247) Building on this foundation, the present research shifts the focus toward linguistic mechanisms of identity formation in literary discourse, with particular attention to how narrative voice, discourse structures, and sociolinguistic variation construct selfhood and cultural identity in contemporary novels. (Hajiyeva, 2024, p.4003) In this way, the current study extends earlier work by moving from reader-response and thematic-cultural interpretation toward a more linguistically grounded analysis of identity construction in literary texts.

Works such as How to Be Both by Ali Smith (2014) and Frankissstein by Jeanette Winterson (2019) present characters who challenge conventional gender categories, encouraging readers to reconsider established norms. Although each novel adopts its own distinctive approach, both contribute to the broader literary discourse on the evolving nature of gender identities in the twenty-first century. In How to Be Both, two different directions, two different temporalities, and two distinct spaces are portrayed. The novel was published in two versions, both bearing the same title; however, because the order of the chapters differs, the existence of two separate editions creates a sense of confusion among readers. As reflected in the title itself, throughout the novel death and life, fantasy and reality, past and present, art and life, living people and ghosts, creation and destruction are presented in parallel. Two separate yet interconnected life stories merge, influence one another, and simultaneously reveal similarities, creating the novel's distinctive style. One of the most intriguing aspects of the novel is that it not only presents two intertwined narratives centered around two major characters, but also exists in two separate editions. Both versions share the same cover and expressive design. The novel is divided into two parts. Ali Smith names both sections "One" in order not to privilege one narrative over the other and to avoid separating relativity.

On the one hand, the novel portrays the life of George (Georgia), a girl living in the contemporary period. Through her memories of the moments spent with her deceased mother, her emotional suffering, and her aspiration to become an artist, readers also gain information about her mother, Carol. This part is narrated in the third person. On the other hand, the novel depicts the life of the Renaissance painter Francesco del Cossa. Perhaps the only connection between these two parts is George's mother, Carol, since Francesco was her favorite painter. This section is narrated in the first person by Francesco's spirit.

After George visits the National Gallery in London, Francesco's spirit not only follows her but also begins communicating with her about his life and art. Since a historical Renaissance painter named Francesco actually existed, Ali Smith possibly adds the letter "h" to transform him into a fictionalized character, changing Francesco into "Franchesco." When Franchesco's spirit first sees George, he assumes that George is a boy. Although throughout the novel George is generally perceived as female, this is never fully certain. George and her classmate Helena (often referred to simply as "H" in the novel – perhaps symbolically connected to the added "h" in Franchesco's name) work together on a school project centered around Franchesco. During their conversations, they try to imagine how a person from the Renaissance might have spoken: *"Wouldn't it be better if we just imagine him talking the way we do?"* (Smith, 2014, p.138) Later, it becomes clear that Franchesco is actually female. In order to gain greater freedom, receive better education, and pursue a career as an artist, she follows her father's suggestion to wear loose-fitting clothes and live as a boy.

By living as a man and building an artistic career during a period when women faced severe restrictions, Franchesco challenges social norms and expectations. The character's resilience and determination emphasize the transformative power of individuality in negotiating and subverting gender norms. In general, considering the ambiguity surrounding the gender identities of the main characters, themes such as eyes, vision, perception, and prejudice become central motifs. This demonstrates that not only the physical act of seeing, but also understanding and perception themselves constitute important concepts within the novel. The dialogues between George and her mother particularly emphasize that people usually judge only the surface and visible appearance of others, without considering what lies beneath or the processes that shape identity. As Carol states: *"But the first thing we see, her mother said, and most times the only thing we see, is the one on the surface. So does that mean it comes first after all? And does that mean the other picture, if we don't know about it, may as well not exist?"* (Smith, 2014, p.103) Consequently, through both its structure and context, Ali Smith deconstructs concepts such as personality, gender, and identity in How to Be Both.

In Frankissstein, Jeanette Winterson introduces the non-binary transgender character Ry in what is presented as a love story: *"I am what I am, but what I am is not one thing, not one gender. I live with doubleness."* (Winterson, 2019, p.89) Thus, Ry embodies the disruption of the boundaries of the gender binary, identifying with both genders while fully belonging to neither. Ry's lover, Victor Stein, describes Ry's body as "hesitant": *"now male, now not quite, now quite clearly a woman who will slip inside a boy's body, who will sleep on their back like a new-made sculpture with the paint not dry."* (Winterson, 2019, p.298)

It should be noted that the enforcement of the gender binary affects all individuals, regardless of whether the possibility of crossing established gender boundaries is recognized or denied. While portraying Ry, Winterson deliberately replaces the traditional pronouns "he/she" with the gender-neutral pronouns "they/them." Although Ry transcends socially constructed gender limitations, traces of socially internalized gender expectations remain visible in Victor Stein's dialogue with them: *"You don't have to look after me just because you were once a woman."* (Winterson, 2019, p.121) At the same time, the novel contains other characters who represent hegemonic and conservative social attitudes. One of these is Ron Lord, who cannot comprehend the possibility of anything existing outside the limits of hegemonic norms. As a result, he struggles to understand and accept Ry during their conversation: *You are a woman, then? says Ron. – No, Ron. I am hybrid. My name is Ry. – You are a bloke, then? says Ron. – I'm trans. – Like transhuman? – Transgender. – You look like a bloke, says Ron. Not a serious bloke, but a bloke. I wouldn't have given you that interview at the Sexpo if you was a girl."* (Winterson, 2019, p.84) The central themes of the novel are transhumanism and identity. The work presents the general problems faced by transgender individuals: psychological struggles with their inner selves, attempts to define their identities, social rejection, discrimination, verbal and non-verbal humiliation, exclusion by society, physical violence, assault, conspiracy, and suicide. These are represented as significant gender-related issues of the contemporary era.

Both *How to Be Both* and *Frankissstein* encourage readers to develop empathy toward diverse gender identities through complex characters that embody gender fluidity and non-binary identities, while simultaneously inviting readers to reconsider socially constructed gender norms.

In 2019, one of the two feminist writers awarded the Booker Prize was the Canadian author Margaret Atwood for *The Testaments*, while the other was the British writer Bernardine Evaristo for Girl, Woman, Other. (Evaristo, 2019) Evaristo also became the first Black woman to receive this prestigious award. Her achievement represented a major milestone for Black British women writers whose contemporary literary voices had gained international recognition.

In *Girl, Woman, Other*, Evaristo constructs an interconnected narrative of twelve characters, primarily Black women, creating a literary panorama that reflects the intersections of race, gender, sexuality, and class. Although these twelve women differ greatly from one another, they share common experiences of stigmatization, misunderstanding, and social isolation. These marginalized women are not merely victims of oppression; they also become agents of transformation and change. The novel presents characters from diverse racial, ethnic, sexual, and socio-economic backgrounds. Through characters such as Yazz and Dominique, Evaristo demonstrates both individuality and shared experiences, emphasizing the complexity of lived identity. The novel explores the intersections of race and class through characters such as the feminist playwright Amma and the successful banker Carole, showing how racial and class dynamics shape opportunities and social perception. The work also represents diverse gender identities and sexual orientations. Characters such as Morgan, a non-binary social media influencer, and Dominique, a lesbian playwright, demonstrate how identity shapes experiences, relationships, and societal expectations. In addition, many characters possess immigrant backgrounds. The experiences of characters such as Winsome, who migrated from Barbados, and Hattie, whose roots are connected to Nigeria, reveal how race, gender, and migrant status contribute to the formation of complex identities.

Girl, Woman, Other is also deeply connected with feminism and activism, exploring how individuals negotiate their roles while struggling with identity-related issues. Amma's history as a feminist activist, Dominique's involvement in LGBTQ+ activism, and the participation of various characters in social and political movements create important discussions surrounding gender and identity politics. (Evaristo, 2019) The novel furthermore presents insights into how social attitudes and expectations evolve across different historical periods. Intergenerational dynamics provide historical context for understanding contemporary issues, demonstrating how identity formation, self-discovery, and self-perception differ across generations.

All of the nuances discussed throughout the novel are united by one central theme: gender. Even the title itself raises questions from the very beginning. In *Girl, Woman, Other*, whom does Evaristo refer to as the "other"? Through the stories of twelve women, readers witness how "otherness" is assigned to women who differ in some way or who are perceived as different by society. These women do not conform to traditional understandings of femininity because of their appearance, skin color, or sexual orientation; consequently, they are stigmatized and socially marginalized. Through diverse female characters and their life stories, Evaristo demonstrates how stigmatization and oppression manifest through gender, race, social class, and sexual orientation, leading to invisibility and social injustice. The women reveal themselves to readers through vastly different life experiences, yet they share a common experience of exclusion and stigmatization due to their differences.

The protagonist Amma closely observes how discrimination operates in society. Reflecting on what it means to be a Black woman among white feminists, Amma recalls: *"she listened as they debated what it meant to be a black woman what it meant to be a feminist when white feminist organizations made them feel unwelcome how it felt when people called them nigger, or racist thugs beat them up what it was like when white men opened doors or gave up their seats on public transport for white women (which was sexist), but not for them (which was racist)."* (Evaristo, 2019, p. 97) At this point, Amma exposes the racial oppression that persists even within feminist spaces dominated by white women. Such conceptualizations of race illuminate not only racism itself, but also the structural inequalities maintained through stigma. Race is associated not only with social spaces, linguistic styles, and fashion, but first and foremost with the body and skin color. (Fanon, 1952, p. 27) Another major character, Yazz, notes that Amma is constantly subjected to invisible discrimination because she does not belong to the dominant majority. Yazz describes Amma as someone attempting to explain to younger generations that aging should not be considered shameful and that surviving itself is a privilege. (Evaristo, 2019, p.3-4)

The women in *Girl, Woman, Other* struggle against oppression and stigmatization. By reflecting upon their struggles, they expose their unequal social positions and create possibilities for change. Rather than adopting the role of powerless victims, they remain critical of the society surrounding them. For example, Yazz rejects subordinate positions, questioning how someone can be *"a Professor of Modern Life"* when all reference points remain male and predominantly white. (Evaristo, 2019, p. 61) These oppressed women possess anger, resistance, and readiness for struggle: *"I'm not a victim, don't ever treat me like a victim, my mother didn't raise me to be a victim."* (Evaristo, 2019, p. 62) Thus, the novel's protagonist Amma openly rebels against traditional binary understandings of gender. Dominique similarly believes that instead of internalizing self-hatred, greater effort should be devoted to Black feminist politics. (Evaristo, 2019, p.79)

It can therefore be argued that the women's stories in Bernardine Evaristo's *Girl, Woman, Other* constitute the central essence of the novel, giving voice to women who are marginalized or excluded from dominant political structures. Each character is stigmatized because of the differences that uniquely define them within society. Despite the vulnerability produced by oppression, they refuse to abandon their differences; instead, these differences create new spaces for experiencing both themselves and the world. (Evaristo, 2019, p. 57) By portraying invisibility, stigmatization, and the pro-

cess of "othering," Evaristo demonstrates that literature itself becomes a space of transformation – a platform through which different forms of thought emerge and through which social and cultural life can be reimagined.

Linguistic Perspective on Cultural Identity Formation. A linguistic approach to cultural identity in How to Be Both, Frankissstein, and Girl, Woman, Other reveals that identity is not a pre-given essence but a discursively constructed process shaped through narrative voice, lexical choice, pronoun use, and dialogic interaction. Across these texts, language functions as the primary site where selfhood and cultural belonging are negotiated, fragmented, and reconfigured. (Sharifian, 2017) From a discourse-analytic perspective, the novels demonstrate that identity is produced through shifting narrative positions and competing voices. In *How to Be Both*, the alternation between first- and third-person narration disrupts narrative stability, producing a polyphonic structure that reflects fragmented subjectivity. The coexistence of Renaissance and contemporary perspectives creates a temporal layering that linguistically encodes cultural hybridity. Deictic shifts, pronominal ambiguity, and metafictional commentary further destabilize fixed notions of the self, suggesting that identity emerges through linguistic perspective rather than objective reality. (Bucholtz, Hall, 2005)

In *Frankissstein*, linguistic representation becomes central to the construction of posthuman and gender-fluid identity. The use of non-binary pronouns ("they/them") and hybrid self-identifications such as "I am hybrid" challenge grammatical and ideological norms embedded in language. From a queer linguistic perspective, the text exposes how grammatical gender systems reinforce cultural binaries, while also showing how language can be re-appropriated to articulate fluid subjectivities. Dialogic exchanges between characters reveal ideological clashes, where language becomes a site of negotiation between normative and non-normative identities.

In *Girl, Woman, Other*, sociolinguistic variation plays a crucial role in constructing cultural identity. Evaristo employs free indirect discourse, vernacular speech, and code-mixing to represent diverse Black British female experiences. The novel's rhythmic, enjambed prose disrupts conventional punctuation and mimics spoken discourse, foregrounding oral culture and collective voice. Identity is thus linguistically indexed through dialect, register, and narrative voice, reflecting intersections of race, gender, class, and migration.

Taken together, these works illustrate a multi-layered linguistic approach to cultural identity: narrative linguistics highlights fragmentation of selfhood, sociolinguistics reveals identity through variation and social positioning, discourse analysis uncovers ideological structures within language, and queer linguistics demonstrates how grammatical systems both constrain and enable identity formation. Ultimately, cultural identity in these novels is not represented as stable or unified but as a dynamic linguistic process continuously produced through discourse, interaction, and narrative form.

Table 1

Critical Analysis of Identity Construction in Contemporary Literary Discourse

Linguistic Dimension	***How to Be Both* (Ali Smith)**	***Frankissstein* (Jeanette Winterson)**	***Girl, Woman, Other* (Bernardine Evaristo)**
Narrative Structure	Dual narrative; non-linear temporality; fragmented storytelling	Multi-voiced hybrid narrative combining realism, philosophy, and speculative discourse	Polyphonic structure with interconnected life stories
Voice & Focalization	Alternation between first- and third-person narration; shifting subject positions	Fluid narration blending monologue, dialogue, and philosophical reflection	Multiple narrative voices with flexible focalization
Identity Construction	Fragmented, temporal, and relational selfhood	Fluid, non-binary, and post-human identity	Intersectional identity shaped by race, gender, class, and sexuality

Table 1 (continuance)

Language & Grammar	Deictic shifts, pronoun ambiguity, metafictional language	Disruption of grammatical gender; use of non-binary pronouns ("they/them")	Vernacular speech, rhythmic prose, reduced punctuation
Sociolinguistic Features	Cultural hybridity through historical and contemporary discourse layering	Ideological tension between normative and non-normative identity discourse	Code-switching, dialect variation, diasporic linguistic forms
Gender Representation	Ambiguous and shifting gender identity	Explicit non-binary identity and gender fluidity	Multiple gender identities (lesbian, feminist, non-binary, etc.)
Cultural Identity Formation	Memory, art, and historical layering	Technology, science, and posthuman discourse	Migration, diaspora, race, and intergenerational experience
Linguistic Approach	Narrative linguistics; discourse analysis	Queer linguistics; posthuman discourse analysis	Sociolinguistics; cultural and intersectional linguistics
Key Linguistic Effect	Fragmentation and multiplicity of self	Deconstruction of binary identity systems	Polyphony and intersectional voice

Woman, Other reveals that each text interrogates cultural identity through different but interconnected linguistic strategies, collectively challenging essentialist understandings of selfhood. From a critical discourse perspective, these novels do not merely represent identity; they actively produce it through narrative form, voice, and linguistic experimentation.

In Ali Smith's novel, the dual structure destabilizes epistemological certainty by refusing a single authoritative narrative. The alternation of perspectives creates what can be read as a dialogic tension, where meaning is continuously deferred. This fragmentation reflects poststructuralist assumptions that identity is never unified but constructed through shifting linguistic positions. The instability of reference, particularly in temporal and pronominal shifts, undermines linear subjectivity and instead presents identity as an emergent textual effect.

Jeanette Winterson's *Frankissstein* extends this destabilization into the realm of gender and embodiment. Through the linguistic representation of non-binary identity and the disruption of grammatical gender norms, the novel exposes the ideological constraints embedded in language itself. From a queer theoretical standpoint, identity is shown to be performative, yet Winterson also complicates this by introducing posthuman discourse, suggesting that subjectivity is not only socially constructed but technologically and biologically mediated. The hybridized language used to describe Ry foregrounds the limits of binary classification systems.

In Bernardine Evaristo's *Girl, Woman, Other*, identity is constructed through a radical heteroglossia. The novel's stylistic refusal of conventional punctuation and its rhythmic, hybrid prose structure reflect oral traditions and diasporic speech patterns. Here, language becomes a site of resistance against dominant cultural narratives. The intersectional identities of the characters are not only thematically presented but linguistically encoded through variation in register, voice, and narrative flow.

Collectively, these texts demonstrate that cultural identity in contemporary fiction is a discursive construct shaped by linguistic multiplicity. They challenge stable categories of gender, race, and subjectivity, instead foregrounding identity as fluid, relational, and continually renegotiated through language.

Conclusion. This study has demonstrated that cultural identity in contemporary literary discourse is not a stable or pre-existing category but a dynamic construct formed through linguistic and narrative processes. Through the analysis of How to Be Both, Frankissstein, and Girl, Woman, Other, it becomes evident that language functions as the primary medium through which selfhood is fragmented, negotiated, and reconfigured within shifting cultural contexts.

Across the three texts, different linguistic strategies contribute to the construction of identity. Smith employs fragmented narrative structures and shifting focalization to destabilize linear subjectivity, suggesting that identity emerges through multiplicity and temporal layering. Winterson, on the other hand, foregrounds the limitations of grammatical systems and binary gender structures, using queer and posthuman discourse to represent identity as fluid, hybrid, and technologically mediated. Evaristo's polyphonic and sociolinguistically rich narrative highlights intersectional identity formation, where race, gender, class, and migration intersect and are linguistically encoded through voice diversity and stylistic variation. Despite their stylistic and thematic differences, all three novels converge on the idea that identity is discursively produced rather than inherently fixed. Narrative voice, pronoun usage, register variation, and structural experimentation function as linguistic mechanisms through which cultural identity is continuously constructed and reconstructed. These texts also challenge dominant ideological frameworks by exposing how language both reflects and shapes systems of power, inclusion, and exclusion.

Ultimately, the findings of this study confirm that contemporary literary discourse serves as a critical space for rethinking identity. It reveals that selfhood is not a singular essence but a fluid, relational, and context-dependent process shaped by linguistic interaction. By integrating discourse analysis, sociolinguistics, narrative linguistics, and queer linguistic perspectives, the study contributes to a deeper understanding of how literature participates in the ongoing formation and redefinition of cultural identity in the twenty-first century.

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DOI https://doi.org/10.30525/2592-8813-2026-2-56

DEVELOPMENT OF THE AZERBAIJANI LITERARY LANGUAGE IN THE EARLY 20TH CENTURY IN THE WORK OF TOFIG HAJIYEV

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Abstract. The article studies the development of the Azerbaijani literary language in the early 20th century in the work of Tofig Hajiyev. Speaking about the leading branch of the artistic style of the early 20th century, Tofig Hajiyev notes that the satirical movement, especially the magazine "Molla Nasreddin", played an exceptional role in expanding the semantic possibilities of the Azerbaijani literary language and increasing the figurative quality of artistic speech at the beginning of the 20th century, and notes that this literary school brought the rich means of expression in the living spoken language of the people to the center of the literary language, demonstrating the functional capabilities of all layers of the language. Tofig Hajiyev systematized the formation of the state language policy in the country with a broader historical chronology, dividing it into stages. In the first stage, covering the years 1918-1920, the acquisition of state status of the language and the restoration of national identity during the period of the Azerbaijan Popular Front and the work done in this direction were examined. The second stage, covering the years 1920-1991, characterized the development and limitations of the Azerbaijani language under Soviet rule, and the transition of language policy to a new level in the Independent Republic of Azerbaijan after 1991.

Key words: language, formation, Turkic, roots, formation of language, unified communication.

Introduction. In the twentieth century, the Azerbaijani literary language entered a fundamentally new stage of development, primarily because Azerbaijan gained its first national independence during this period. Although the existence of the Azerbaijan Democratic Republic was chronologically brief, its strategic significance in the centuries-long history of the Azerbaijani people remains invaluable. The most distinctive feature of this period was that the reforms implemented by the ADR within a very short time were comparable in scale and importance to transformations that normally require centuries. The ADR entered history not only as the first parliamentary and democratic republic of Azerbaijan, but also as the first democratic republic in the entire Eastern world. The principal symbols of an independent state – including the national flag, anthem, coat of arms, and state language – were officially institutionalized precisely during this period.

Within the scholarly legacy of Tofiq Hajiyev, the ADR period occupies a special place in the context of linguistic research. The scholar divides the developmental dynamics of the twentieth-century Azerbaijani literary language into two fundamental stages:

- the literary language of the Republican period;
- the literary language during the Soviet era.

Tofiq Hajiyev systematized the formation of state language policy in Azerbaijan within a broader historical chronology and proposed the following stages:

1. The first stage, covering the years 1918–1920, was characterized by the elevation of the Azerbaijani language to the status of a state language during the ADR period and by the restoration of national identity.

2. The second stage, encompassing the years 1920–1991, was marked by both the development and the restrictions of the Azerbaijani language under Soviet rule.

3. The third stage, beginning after 1991, is characterized by the transition of language policy to a new level in the independent Republic of Azerbaijan.

According to the scholar, the language policy implemented during the ADR period played the role of a national and spiritual foundation for subsequent historical periods. The declaration of the mother tongue as the state language during the short period of sovereignty established the ideological basis for Azerbaijan's future language strategy (Ahmadova, 2010, p. 7).

Discussion.

The Development of the Literary Language at the Beginning of the Twentieth Century

In the history of Azerbaijani philological thought, the late nineteenth and early twentieth centuries are regarded as a decisive stage in the formation and development of the literary language. In the studies of Tofiq Hajiyev, the linguistic landscape of this period is presented as an extremely complex and multidimensional process. The sharp contradictions observed in the economic, political, and legal spheres of society during that historical period naturally manifested themselves in culture, art, and particularly in attitudes toward language.

Tofiq Hajiyev devoted a special study to this important transitional period and classified the significant changes that occurred in the structure of the literary language. According to the scholar's scientific conclusions, the principal achievements of this period can be summarized as follows:

1. The functional styles of the Azerbaijani literary language, including publicistic, artistic, scientific, and other styles, entered a stage of full formation precisely during this period.
2. Compared with previous centuries, national language norms acquired a more stable and consolidated character.
3. Although the general level of illiteracy remained high at that time, the literary language, due to its multifunctional nature, gradually began to penetrate broader social strata.

According to Hajiyev, it would be incorrect to imagine this developmental process as entirely smooth and flawless. The evolution of the language took place within the specific historical and cultural conditions of Azerbaijan and was accompanied by its own unique complexities and contradictions (Hajiyev, 1991, p. 6).

The scholar justifiably notes that the emergence and development of capitalism played a significant role in the formation of the national literary language. Economic growth and the expansion of capitalist relations stimulated the advancement of science and education while simultaneously creating favorable conditions for their development. During this period, the network of schools expanded considerably. In connection with this process, textbooks in the mother tongue were prepared and educational materials were published. The Azerbaijani language began to be systematically taught, and books devoted to its phonetic and grammatical structure were written. Although not always consistent or systematic, newspapers and journals intended for school-age readers – such as *Dabistan*, *Rahbar*, *Maktab*, and *Gunash* – were published, and literary anthologies were compiled. All these measures were essential for the development of the Azerbaijani literary language, as well as for the refinement and standardization of its norms (Hajiyev, 1991, p. 8).

The development of the press, the professionalization of Azerbaijani theatrical art, and the advancement of political thought became the most influential factors shaping the national literary language during this period. According to the scholar, at the beginning of the twentieth century the Azerbaijani national literary language already possessed the following functional styles: artistic style, scientific style, publicistic style, religious (Sharia) style, and official-epistolary style (Hajiyev, 1991, p. 10).

According to Tofiq Hajiyev, the language of the textbooks published during this period was nourished by various linguistic sources while simultaneously preserving a certain degree of autonomy. The scholar even suggests that, due to the independent grouping of these speech patterns, it would be possible to distinguish a separate "textbook style" within the literary language. Hajiyev particularly draws attention to the Arabic and Persian loanwords published in the journal *Maktab* together with their national Azerbaijani equivalents. Referring to examples presented in the first issue of the journal in 1911, the scholar emphasizes that even a number of words which had already gained

full acceptance and "citizenship rights" in the Azerbaijani language were nevertheless translated and explained for readers. Among such examples are *tabassum* – "silent laughter," *tahluka* – "fear," *hiddat* – "anger," and *hayat* – "life, vitality."

After analyzing the language of the textbooks published at the beginning of the twentieth century, the scholar concluded that despite their distinctive linguistic characteristics, it would not be scientifically justified from a linguistic and stylistic perspective to consider the language of these sources as an entirely independent functional style. According to Hajiyev, this stylistic tendency gradually dissolved within the spheres of children's literature on the one hand and scientific style on the other (Hajiyev, 1991, p. 16).

According to the scholar, as in previous historical periods, the artistic style remained the leading branch of the literary language at the beginning of the twentieth century. Both in terms of volume and practical application, the artistic style fully deserved this avant-garde position. At the same time, almost all debates concerning language in public life found their real and practical manifestation precisely within artistic language (Hajiyev, 1991, p. 17).

Hajiyev further notes that one of the most significant features of the artistic style of this period was the further development and expansion of the realist prose language established by Mirza Fatali Akhundov. During this period, prose achieved such a scale and level of development that it gradually displaced poetry from its former hegemonic role as the dominant medium of artistic expression. Consequently, by the beginning of the twentieth century, the language of prose and the language of poetry had become equal components within the artistic style.

According to Tofiq Hajiyev, linguistic materials in artistic expression were approached differently depending on aesthetic concepts, literary trends, and ideological positions. As a result, internal microsystems or subsystems began to emerge within the structure of artistic language. The scholar identifies these stylistic subdivisions of artistic style as follows: satirical language, romantic language, realist-romantic language, the language of children's literature, and folkloric language (Hajiyev, 1991, p. 17).

The scholar justifiably points out that during this period there also existed a branch of artistic style that continued the language traditions of classical poetic genres. However, representatives of this branch were unable to keep pace with the modern environment either ideologically or linguistically, and they merely repeated outdated expressions, stereotypical constructions, and aging poetic images. Since they were unable to exert any serious influence on the developmental tendencies of the national literary language, the scholar does not devote extensive attention to them. Among such representatives he includes writers such as Mirza Hasib Qudsi, Chaker Nakhchivani, Jannati, Mushkat, and others.

Discussing the leading branch of the artistic style of the early twentieth century, Tofiq Hajiyev emphasizes the exceptional role played by the satirical literary movement, particularly the Molla Nasraddin magazine, in expanding the semantic possibilities of the Azerbaijani literary language and increasing the figurative richness of artistic speech. According to the scholar, this literary school brought the rich expressive means of the living spoken language of the people into the center of literary language and demonstrated the functional potential of all layers of the language system.

According to Tofiq Hajiyev, the language system of the Molla Nasraddin writers and the satirical literature of that period was characterized by several fundamental stylistic features:

1. Preference for simplicity and even colloquial expressiveness in vocabulary and syntactic structure made speech understandable for the broad masses.
2. Everyday words and expressions acquired new socio-political meanings and developed polysemantic nuances within satirical contexts.
3. The inner world of characters was revealed through their own speech, while the object of criticism was conveyed to the reader through irony and sarcasm.

4. By drawing upon the rich potential of the living folk language, linguistic material necessary for every functional style was introduced into literary circulation (Hajiyev, 1991, p. 18).

The scholar correctly concludes that simplicity, clarity, linguistic purity, close adherence to the core lexical fund of the language, and the conciseness of sentences constituted the principal normative system of textbooks and children's journals of that period. Certainly, when analyzed separately, examples from other functional styles could also demonstrate a comparable level of clarity and simplicity. However, no other style as a whole consistently maintained such a level across all its texts, nor was it expected to do so. In textbook language, by contrast, examples belonging to different styles were synthetically unified at the same level. A single dominant principle – the principle of comprehensibility – was strictly preserved. In this sense, the language of textbooks created harmony among various functional styles (Hajiyev, 1991, p. 15).

The Azerbaijani satirical thought of the early twentieth century possessed a distinctive linguistic structure and became an integral part not only of the nation's artistic taste but also of its broader intellectual and spiritual history. The language of satire during this period represented one of the decisive stages in the evolution of the Azerbaijani language as a form of national consciousness and expression.

The satirical style introduced numerous innovations into the written literary language. First of all, the sharp exposing elements, humorous shades, and thought-provoking forms of expression characteristic of oral folk satire entered the structure of written literary language and enriched it considerably. On the other hand, the newly emerging satirical language enhanced society's analytical thinking abilities and fostered a more critical and sensitive attitude toward surrounding social realities. Satirical discourse thus became not merely a means of entertainment or laughter, but an important linguistic instrument awakening the intellectual potential of the people and encouraging them to comprehend social realities more deeply (Hajiyev, 1991, p. 18).

During this period, Azerbaijani poets writing in the satirical genre rendered exceptional services to the development and enrichment of the Azerbaijani language. They were among the first to introduce the vocabulary of the living folk language into literary language on a mass scale. At the same time, they actively created new words and expressions, many of which were rapidly accepted by the public. Because these lexical innovations often possessed idiomatic, phraseological, and aphoristic qualities, they easily entered popular consciousness and remained memorable for broad audiences. Their dissemination resembled the traditional mechanisms of folklore transmission: they spread from mouth to mouth, from village to village; some were read in newspapers, others heard on stage, and eventually transmitted into hundreds of minds. Consequently, these new expressions not only enriched the linguistic treasury of the people but also contributed to the popularization of the literary language itself. Over time, although the creators of these expressions were originally known, such linguistic formations gradually distanced themselves from their authors and became anonymized, much like authentic folklore elements. Nevertheless, because they were preserved in written form, readers familiar with the sources could still identify their creators. These widely used metaphors, expressions, and phraseological units functioning both in everyday speech and within professional circles remain enduring linguistic legacies gifted to the Azerbaijani language by the satirists of the twentieth century (Hajiyev, 1991, p. 18).

Emphasizing the importance of word formation for the creators of the satirical style, Tofiq Hajiyev argues that Mirza Alakbar Sabir and Jalil Mammadguluzadeh, who shaped the revolutionary satirical style, paid particular attention to lexical selection, ensuring that no detail or "small mechanism" of expression was overlooked. They clearly understood that tradition alone, regardless of its richness, was insufficient for the formation of a new literary and ideological style. Although classical poetry possessed an extensive and sophisticated lexical reservoir, this vocabulary could not adequately serve the newly emerging revolutionary satirical discourse in its original form. Therefore, it became

necessary to "break apart" the traditional lexicon, to "destroy" established conventions, and to renew the poetic vocabulary. Reliance solely on conventional poetic words and expressions was no longer possible. The new satirical style required the identification of "unfamiliar" vocabulary within poetic language – individual lexical units and phraseological expressions previously considered unconventional – and the legitimization of this new vocabulary within the literary language, ultimately transforming it into an accepted linguistic norm (Hajiyev, 1983, p. 6).

The researcher justifiably emphasizes that Azerbaijani-language satirical poetry possesses deep historical roots and that this genre reached its highest stage of development precisely in the creative personality of Mirza Alakbar Sabir. In Sabir's literary activity, satire transcended the boundaries of simple ridicule and individual lampooning, gradually acquiring a broader social, intellectual, and aesthetic significance. Satire was transformed into an instrument of public criticism, national awakening, and social consciousness.

According to Tofiq Hajiyev, the widespread popularity, influence, and success of folk satire were preceded by a long process of linguistic and cultural preparation. Long before this satirical language reached the broader socio-aesthetic masses, it had already existed at the "cellular" and "atomic" levels of popular consciousness. Before becoming a powerful and explosive social force, this satirical discourse survived in the form of separate linguistic and cultural "atoms." The satirical traditions associated with figures such as Molla Nasraddin and Bahlul Dananda existed first as sparks before eventually transforming into the powerful satirical flame embodied in Sabir's language (Hajiyev, 2005, p. 3).

One of the most interesting aspects of Tofiq Hajiyev's approach is his comparative analysis of Mirza Alakbar Sabir and Muhammad Fuzuli. According to the scholar, these two monumental figures of Azerbaijani literary thought – the greatest lyrical poet and the sharpest satirist – may be compared to different yet complementary poles within the same magnetic field. From this perspective, the relationship between lyrical and satirical principles resembles a force of attraction governed by the laws of physics. Although they appear externally as opposite poles, analogous to positive and negative charges, the internal connection and mutual influence between them remain constant and inseparable (Hajiyev, 2005, p. 19).

The scholar further notes that Sabir's creative relationship with Fuzuli developed through three distinct stages. During the first stage, Sabir functioned as a representative and follower of the Fuzuli school. For a long period, he imitated his great predecessor and remained deeply influenced by the literary traditions of that school. At this stage, Sabir was simultaneously both a reader and a "captive" of the Fuzuli tradition; while learning from it, he increasingly aspired toward innovation, independence, and creative freedom, yet remained unable to fully liberate himself from its influence. Sabir spent nearly thirty years as a disciple of this literary school. However, his true artistic triumph became fully visible only after he transcended and distanced himself from it. On his independent creative path, he successfully utilized the knowledge and artistic experience acquired from the Fuzuli tradition while simultaneously creating an entirely original satirical style of his own.

In representatives of the Fuzuli literary school, the romantic veil of Muhammad Fuzuli created a kind of mist between the poet and real life. Through this haze, the realities of life appeared blurred and indistinct, and objects could no longer be perceived in their true colors. However, this veil was transparent in Fuzuli himself and revealed reality clearly from the other side. Those who later identified themselves as "followers of Fuzuli," dazzled by the brilliance of Fuzuli's imagery, perceived life and truth only dimly and obscurely. Sabir was initially among them. Fascinated and deeply inspired by the universal beauty of Fuzuli's poetic images, Mirza Alakbar Sabir attempted to create works similar to those of his predecessor. At times, he was even successful in doing so. In some of his early poems, one can observe images capable of deeply affecting human emotions, while traces of Fuzuli's sincerity and characteristic laconic style become clearly visible.

In the later stage of his development, however, Sabir gradually distanced himself from Fuzuli – sometimes in terms of form, sometimes in terms of content, and occasionally in both form and content simultaneously. This period coincided with the beginning of the twentieth century and covered the stage preceding both the Molla Nasraddin movement and Sabir's mature satirical творчество (Hajiyev, 1966, p. 44).

The scholar notes that relatively few poems belong to this transitional period, explaining that Sabir was less productive during these years than either in his earlier or later creative stages. Although this phase represented a period of awakening for Sabir's individual style, it simultaneously constituted a crisis period within his overall literary development. According to memoirs of contemporaries, Sabir wrote sharp and witty satirical pieces during this time, yet even this was interpreted as a sign of his creative crisis and internal artistic uncertainty.

Conclusion. According to Tofiq Hajiyev, Sabir was gradually leaving the Fuzuli school behind; however, bidding farewell to the literary master who had long dominated his artistic consciousness generated serious creative hesitations and intellectual turmoil within him. Apparently, these internal contradictions sometimes resulted in periods of stagnation and silence in Sabir's creative thought.

The scholar considers the poem "Beynalmilal" ("The International") to be the most complete embodiment of the transitional stage in Sabir's style, both ideologically and stylistically. At the same time, this poem prepared the foundation for the third stage of Sabir's creative evolution.

"Beynalmilal" demonstrated that revolutionary pathos had already begun to permeate Sabir's literary style. According to Hajiyev, this pathos was generated directly by the revolutionary atmosphere itself. Nevertheless, this did not yet mean that Sabir had fully adopted a consistently militant revolutionary position. The waves of revolution struck Sabir, shook his inner world, and compelled him to speak out – for revolution itself is a force of coercive transformation. At times, these revolutionary waves entirely carried him away and involved him in the mission of "revealing truth to the people and eliminating ignorance." These revolutionary currents ultimately liberated Sabir from the spell of Fuzuli and distanced him from the overpowering influence of the classical tradition. However, Sabir was still unable to free himself completely from that enchantment. At the same time, the thunder of revolutionary upheaval clarified his thoughts and dispersed the mystical fog created by the dominance of the old literary tradition.

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DOI https://doi.org/10.30525/2592-8813-2026-2-57

PSEUDONYM AS AN INTEGRAL ELEMENT IN THE WORKS OF AZERBAIJANI, ENGLISH AND AMERICAN WRITERS AND POETS

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Abstract. The article examines the phenomenon of pseudonym usage in Azerbaijani, British, and American literature across different periods of social and cultural development. The study aims to identify the main reasons that motivated writers to adopt pseudonyms and to analyze the methods and principles of their formation. Particular attention is paid to the historical, political, social, cultural, and gender-related factors that influenced authors' decisions to conceal or modify their real identities. The research explores how pseudonyms served various functions, including protection from censorship, avoidance of social prejudice, creation of a distinct literary image, and separation of personal and professional spheres. Through a comparative analysis of literary traditions in Azerbaijan, Great Britain, and the United States, the article reveals both common and culture-specific patterns in pseudonym creation. The findings demonstrate that pseudonyms represent not only a means of anonymity but also an important linguistic and cultural phenomenon reflecting the relationship between authors, society, and literary practice. The study contributes to a deeper understanding of authorial identity and naming strategies in world literature.

Key words: Pseudonym, classic author, work, authorial identity, pertinent, sign-off.

Introduction. This article is devoted to the study focuses on the pseudonyms of Azerbaijani, British and American writers. The relevance of this research stems from the fact that pseudonyms carry immense historical and social significance, serving as an integral part of a nation's culture.

The word "pseudonym" originates from Ancient Greek. It literally translates as "false name" and consists of two parts: pseudes (Greek: ψευδής) – false, fictitious; and onoma (Greek: ὄνομα) or onyma – name. Literary works published without an author's signature (anonymous) or under a pseudonym have been known since ancient times. Before examining the pseudonyms of celebrated authors, it is necessary to highlight the specific underlying factors that prompted their emergence: 1. Political or Personal Security**:** Fear of political persecution, censorship, or legal repercussions. 2. Aesthetic Considerations: The phonetic unappealingness or perceived unmarketability of the author's legal name. 3. Socio-Professional Constraints: High social standing or professional roles (such as civil service, academia, or the military) that deemed literary pursuits inappropriate or undignified. 4. Defensive Strategy against Criticism: A deliberate attempt to insulate the author's personal reputation from hostile critical reception. 5. Conformity to Literary Trends: Aligning with contemporary artistic fashions or cultural movements that favored specific types of names. 6. Onomastic Differentiation: The necessity to avoid confusion caused by sharing a surname with already established writers or public figures. 7. Literary Mystification and Reader Engagement: The intentional creation of a literary hoax or riddle designed to intrigue audiences and provoke speculation regarding the author's true identity. 8. Altruistic Modesty: Genuine humility or a fundamental indifference to public renown and celebrity status.

The purpose of this study is to identify the reasons why Azerbaijani, British and American writers adopted pseudonyms across various historical periods of social development, and to describe the methods of their formation.

Discussion and results. First and foremost, I would like to direct our attention to the creative output of the great and eminent Azerbaijani classical authors.

Manisa Khatun Mehseti Ganjavi, who is one of the founders of the new poetic school and new poetic genre in the Azerbaijani literature of the 12th century, is one of the masters of words who played an important role in the creation and development of the humanistic trend in our literature. There are quite contradictory opinions about this poetess. She is also one of the heroines of the epic "Amir Ahmed and Mehseti", which exists in four copies. She was a bright representative of the Muslim renaissance who lived in the late 11th – early 12th century, and was a representative of the new urban poetry who glorified the images of artists, poets, singers and poets in his poems. Mehsati won first place in everything. She is the first famous medieval Azerbaijani poetess, the first female chess player, and probably the first female composer in the East. Mehsati Ganjavi was born in the city of Ganja around 1089 and lived here until the end of her life. This girl's real name was Manija, and she took the name Mehsati as a literary pseudonym. There are several stories about the origin of that nickname. In one of them, it is said that in one of her conversations with Sultan Sanjar, she told Sultan that she was the smallest and invisible in her environment. The Sultan disagreed with her and said, "to, meh-hasti" (that is, "you are the greatest of all"). And supposedly "meh-hasti"- has become "mahsati", her nickname. According to the hypothesis put forward in the part called "Conclusion" of Abbasgulu Agha Bakikhanov's work "Gulistani-Iram", "Mahsati" consists of two words, "mah" and "seti" and means "great lady". Finally, according to another possibility, this name is composed of the words "Mah" and "seti" ("Hey Lady") (Nizami Ganjavi's Mahin Banus (Khosrov and Shirin) is analogous to this). Mehsati Ganjavi's rubai, which is close to the style of folk poetry, and her poems, which are deep in their philosophical essence, played an important role in the history of Azerbaijan and Eastern poetry in general (Habibli, 2022).

Khagani Shirvani Khagani was born in 1126 in Shemakha. The name of this poet is Ibrahim, the patronymic is Ali. In medieval sources he is presented as follows: Abu Badil Afzaladdin Ibrahim ibn Ali Najar ibn Osman ibn Ibrahim Hagaigi Hassanul-Ejem Khagani Shirvani. In this compound name, the words "Hagaigi", "Hassanul Ejem" and "Khagani" are pseudonyms of the poet, Afzaladdin is his nickname, Abu Badil is kunya, and the word "Shirvani" indicates the place of which the poet was born. The rich literary heritage of Khagani consists of a divan of lyrical poems in the volume of 17 thousand beits, the poem "Tohfatul-Iragain", as well as 60 letters, which are interesting examples of artistic prose. The poems in the Khagani diwan are written in the genres of qasida, gezel, medhiya, mersiyya, rubai and other genres. His works of socio-philosophical content include the qasidas "Shiniye" and "Medain Ruins", poems under the general title "Hebsiye" and the poem "Tohfatul-Iragain".

Abu Muhammed Ilyas ibn Yusif (Nizami Ganjavi) is an outstanding master of words, who matured in the 12th century on the basis of the culture of the Azerbaijani Renaissance, one of the great thinkers and philosophers. He was born in the ancient city of Ganja, located on the famous Silk Road, where Eastern and Western cultures combined. He received his pseudonym thanks to the Farsi language, in which he wrote poetry. Nizami literally means "stringer of words." "Ganjavi" indicates the place of which the poet was born, like many writers and poets do. Like other predecessors and contemporaries, Nizami also began his artistic work by writing ghazals and qasidas. However, this path did not suit him, and he became seriously interested in epic creativity in the genre of the novel-tale (epic), which began to develop after the 11th century – from the time of Ferdowsi. The first test of his strength in this direction was the work "Makhzanul-Asrar" ("Treasury of Secrets"). This work, written by the poet when he was soon to turn 40 years old, is one of the original examples of the epic genre "mesnevi". In this work, along with the stories and plots of the legend, their artistic value also attracts attention. Stories and epics reflect the main features of epicness – especially artistic language, specific forms of expression and content. Mesnevi consists of 13 legends and 7 stories. As a rule, legends and stories are preceded by "megalates", which serve to verbally reveal philosophical and moral meanings and symbols and their artistic presentation.

Mirza Shafi Vazekh is one of the most brilliant representatives of Azerbaijani social and poetic thought of the first half of the 19th century, the author of exquisitely subtle lyrical songs,

He memorized the entire text of the Koran, mastered the Arabic and Persian languages perfectly, became a connoisseur of oriental poetry, in addition became famous throughout the city for his beautiful handwriting and later earned extra money with private orders for the census and book design of the works of famous oriental poets. Soon he was nicknamed "Mirza" – this is how educated people who knew how to write correctly were called in the East. In addition, from a young age he began to try the pen himself, taking the poetic pseudonym "Mirza Shafi Vazeh": "shafi" in Arabic means "mediator, conciliator", and "wazeh" means "open, clear".

Mirza Fatali Akhundov is an outstanding writer, thinker and public figure who played an important role in the development of literature, social political and philosophical thought of modern times In his youth, M.F. Akhundov began to work as a poet and until the end of his life he continued his poetic work from time to time, writing poetry under the pseudonym "Sabuhi". Akhundzade set the goal of his life and work to the best of his ability enlighten your people, guide them to a new day, light, new dawn – hence his pseudonym "Sabuhi", the man of the dawn. He turned to such poetic genres as goshma, gheraily, muhammes, writing in verse, satirical and moral-didactic poems, qasida. M.F. Akhundov was recognized and became famous as a writer and philosopher, occupying an extremely important place in the history of the development of literary and philosophical thought of Azerbaijan and the Muslim peoples of the Middle East in modern times. At the same time, he is considered one of the brightest representatives of the world educational ideological trend as a whole (Məşədiyev, 2018).

Mirza Alakbar Sabir was born on May 30, 1862, in the city of Shamakhi, part of the Shirvan region of Azerbaijan. His real name was Alakbar Tahirzade. "Sabir" – translated means "patient", "Mirza" is a form of address used to show respect and honor to educated people who can read and write. These names stuck with the poet, although he also had other pseudonyms. Mirza Alakbar Sabir's main pseudonyms are "Author" (in his own works), "Haji" (mainly in the "Haqiqat" newspaper), "Nizadar" (in satirical publications), Mirza Bisavad (in the "Shikayat" feuilleton), and "Az-Taraba-Mirza Bisavad" (in his works). His pseudonym "Nizadar" indicates that he was the leader of the satirical collective. Alekper began his literary activity very early. His first attempts at writing poetry were approved and edited by the renowned poet Seyid Azim Shirvani, who advised him as a teacher. In 1905 and 1906, several of his poems with social content and the well-known satire "Conversation of Twelve Men in a Majlis" were published in the newspaper "Hayat." But Sabir the poet's true strength and fame were revealed in the pages of the magazine "Molla Nasreddin." Sabir's work laid the foundation for a revolutionary satirical literary school and led it himself. Sabir's poetry played a special role in the growing popularity of Molla Nasreddin magazine. Afterward, in addition to his artistic pursuits, he opened the "Ummid" ("Hope") school in Shamakhi and began teaching there. He took an active part in the organization of a library-reading room in Shemakha, the preparation of theatrical performances and other cultural events, both through his artistic creativity and practical activities, and worked as a true citizen to eliminate the consequences of the genocide committed by Armenians against Azerbaijanis. His works have been published multiple times as a book titled *Hophopname*, and numerous scientific articles, monographs, and dissertations have been written about him (Azərbaycan dilinin izahlı lüğəti, 2006).

Jalil Mammadguluzadeh Jalil Mammadgulu oglu Mammadguluzadeh rightfully ranks among the canonical figures of world literature. As the founder of the early twentieth-century Azerbaijani school of critical realism and the visionary behind the revolutionary-democratic satirical periodical *Molla Nasraddin*, he forged a new trajectory for national literature. Mammadguluzadeh distinguished himself as an avant-garde writer, dramatist, journalist, and cultural intellectual, ultimately serving as a champion for the ideals of humanism, democracy, and liberty. Furthermore, the author frequently published under various pseudonyms throughout his literary career. The famous pseudonyms of Jalil

Mammadguluzadeh emerged as tools for denunciatory satire and public enlightenment. They were necessary to safely criticize societal vices, religious fanaticism, and Tsarist censorship, as well as to create the illusion of a collective "voice of the people." The writer himself signed his work with dozens of names, the most famous of which were: 1. Molla Nasraddin: Chosen in honor of the legendary hero of Eastern folktales–a wise man who spoke the bitter truth under the guise of a simpleton. This pseudonym became the overarching brand for the entire magazine, symbolizing laughter in the face of ignorance. 2. Mozalan (The Gadfly): This pseudonym symbolized an annoying yet useful insect. "Mozalan" acted as a whistleblower, delivering painful "bites" to bureaucrats and conservatives to force society to wake up. 3. Laglagi (The Chatterbox): Used to ridicule empty talk, gossip, and idleness. 4. Hardam-khayal (The Dreamer / The Fickle): Applied in articles mocking fruitless daydreams and the lack of real action. 5. Gizdirmali (The Feverish): An ironic pseudonym used to describe a society gripped by a "sickly" slumber or fanaticism. These names reflected the very essence of critical realism. They allowed the author to speak on behalf of various social archetypes of the era, making the satire sharper and more multifaceted (Classics of Azerbaijan literature).

The following section provides an analysis of British and American authors. Many famous writers published their first works anonymously. For instance, Alfred Tennyson did not utilize permanent literary pseudonyms; the poet overwhelmingly published under his legal name–Alfred Tennyson (and later, following his elevation to the peerage in 1883, Lord Alfred Tennyson). Nevertheless, the following nuances can be distinguished within his authorial biography: 1. Early Anonymity: He issued his debut poetry collection anonymously in 1827. Written in collaboration with his brother Charles, it was titled *Poems by Two Brothers*. 2. Satirical Sobriquets: In contemporary literary circles, he was occasionally targeted with derisive nicknames–such as 'Lawn Tennyson' (a satirical pun later referenced by James Joyce in *A Portrait of the Artist as a Young Man*) 3. Domestic Monikers: Within his family circle and among intimate friends, he frequently answered to the affectionate, diminutive nicknames 'Tenny' and 'Sonny' (A Dictionary of Literary Pseudonyms in the English Language, 2000).

James Fenimore Cooper, a distinguished American author best known for the *Leatherstocking Tales*, entered into a wager that he could produce a narrative superior to those read aloud by his family. This prompted the publication of his first novel, *Precaution* (1820). Regarding literary work as an unserious pastime, Cooper published it without attribution. Similarly, his breakthrough novel, *The Spy: A Tale of the Neutral Ground* (1821), was also issued anonymously despite bringing him immediate renown. James Fenimore Cooper did not utilize literary pseudonyms; although his debut novel was issued anonymously, his major works were all published under his legal name. However, his middle name and various sobriquets are frequently subject to onomastic confusion: Fenimore: This is not a pen name, but rather the maiden name of the author's mother, which he officially appended to his surname in 1826. Prior to this legal change, he was known simply as James Cooper.

Similarly, Edgar Allan Poe had at least 3 pseudonyms. He utilized several pseudonyms and assumed names throughout his career: 1. 'A Bostonian': This was Poe's initial literary pseudonym, under which his 1827 debut poetry collection, *Tamerlane and Other Poems*, was published. 2. Edgar A. Perry: An assumed name adopted by Poe in 1827 for the purpose of enlisting in the United States Army artillery regiment. 3. 'The Tomahawk Man': A semi-official sobriquet bestowed upon Poe within contemporary literary circles during his editorial tenure, reflecting his sharp, vitriolic, and uncompromising critical reviews.

At the age of twenty, Arthur Conan Doyle published his early short stories in the *Cornhill Magazine* anonymously. He did not utilize secret literary pseudonyms; however, his full name at birth was Arthur Ignatius Conan Doyle. The development of his surname involves the following biographical details: Conan was originally his given middle name, bestowed in honor of his uncle, the artist Michael Conan. In his mature years, the author began using it in conjunction with his surname as part of his literary persona–Conan Doyle.

The renowned nineteenth-century English novelist Mary Ann Evans adopted the masculine pen name George Eliot. This strategic choice was intended both to command serious critical reception for her novels within a patriarchal literary market and to safeguard her private life from public scrutiny (Room, 2014).

The seminal works that brought international renown to the English author Charles Lutwidge Dodgson were published under the pseudonym Lewis Carroll. When the publisher Edmund Yates requested a pen name for Dodgson's forthcoming poetry, the author submitted four potential options: Edgar Cuthwellis, Edgar U. C. Westhill, Louis Carroll, and Lewis Carroll. Rejecting the first three proposals, Yates selected the fourth, which relied on a sophisticated onomastic derivation from Dodgson's legal name. Specifically, 'Lewis' and 'Lutwidge' both serve as English cognates of the Latin *Ludovicus*, while the Irish surname 'Carroll' and the given name 'Charles' both derive from the Latin *Carolus*. The structural mechanics of this pseudonym creation involved a multi-step linguistic translation: the original name 'Charles Lutwidge' was first rendered into Latin as *Carolus Ludovicus*, followed by a reverse translation back into English. By inverting the sequence of the resulting names–Carroll and Lewis–the iconic pseudonym 'Lewis Carroll' was established. Remarkably, Charles Lutwidge Dodgson maintained a strict binary in his publishing practices, signing his rigorous mathematical treatises with his legal name while reserving his pseudonym for his literary output. Throughout his life, he steadfastly rejected any conflation of his academic persona with his literary alter ego, persistently denying that Dodgson and Carroll were one and the same.

Both emerging and established authors frequently adopt pseudonyms as a defensive mechanism to insulate themselves from critical scrutiny. A contemporary case in point is the renowned British author J.K. Rowling, who assumed the masculine pen name Robert Galbraith for her *Cormoran Strike* detective series. Rowling noted that publishing under an alias liberated her from the burden of public expectation, thereby allowing her to gauge the critical reception of her work through an entirely unvarnished and unbiased lens.

A distinct set of motivations compelled Stephen King to issue the novels *Rage*, *The Long Walk*, *Roadwork*, *The Running Man*, and *Thinner* under the pseudonym Richard Bachman. Principally, the author sought to conduct a sociological experiment regarding literary merit, testing whether his creative alter ego could replicate his commercial success without the benefit of the established 'Stephen King' brand. Additionally, King was constrained by contemporary publishing industry conventions, which traditionally restricted authors to a single book release per calendar year. The selection of the Bachman eponym was a deliberate homage to the rock band Bachman-Turner Overdrive, of whom King was an avid follower.

Seeking to achieve literary autonomy independent of his father's formidable legacy, Stephen King's son, Joseph Hillstrom King, adopted the pseudonym 'Joe Hill.' This moniker was an intentional abbreviation of his legal name, which also served as a direct allusion to his historical namesake. The original Joe Hill was a prominent early twentieth-century American labor activist and songwriter who became a martyr for the labor movement after being wrongfully convicted of murder and executed in 1915." (Pen Names: Secrets of Famous Authors Who Used Pen Names).

When an author seeks not merely anonymity but intentional mystification–either to attribute the text to an alternate persona or to construct a fabricated authorial identity–they may adopt the name of an existing individual. A classic example is William Sydney Porter, who assumed the pen name 'O. Henry,' which is widely believed to be derived from the name of a prison guard, Orrin Henry. Convicted of embezzlement during his tenure as a bank teller, Porter began composing his celebrated short fiction while incarcerated. Although he published fourteen stories under various aliases during his imprisonment, he achieved definitive renown as O. Henry. This celebrated pseudonym debuted in December 1899 with the publication of 'Whistling Dick's Christmas Stocking.' To maintain this literary subterfuge, a confidant in New Orleans brokered the manuscripts to publishers, effectively concealing Porter's incarceration."

Historically, female authors frequently adopted masculine pen names due to pervasive anxieties that publishers would reject a manuscript if its female authorship were known, and that readers would dismiss the work on identical grounds. Contemporary literary critics harbored a similar skepticism toward female authorship. Driven by these institutional barriers, the Brontë sisters–Charlotte, Emily, and Anne–initially obscured their identities beneath the gender-neutral, masculine pseudonyms Currer Bell, Ellis Bell, and Acton Bell.

Conversely, male authors occasionally adopted feminine pseudonyms–a phenomenon known in literary studies as pseudogynegraphy. For instance, the nineteenth-century Scottish writer William Sharp, who produced a substantial body of work rooted in ancient Celtic folklore, published under the self-invented female persona Fiona Macleod. Similarly, the American humorist Benjamin Shillaber wrote extensively under the maternal alter ego Mrs. Partington.

In certain instances, authors deliberately utilized pseudonyms to obfuscate or misrepresent their professional identity. A notable example occurred during the Second World War, when the prominent English writer H. E. Bates published a series of short stories in the *News Chronicle* under the moniker 'Flying Officer X.' This tactical deception stemmed from the editorial reality that the public found bureaucratic facts and statistical records far less compelling than first-hand narrative accounts from active combatants.

Furthermore, many authors adopted toponymic pseudonyms, drawing inspiration from their birthplaces or regions of significant personal relevance. For example, John Wilson–whose dramatic poem *The City of the Plague* famously served as the textual source material for Alexander Pushkin's *A Feast in the Time of Plague*–wrote under the pseudonym 'Christopher North' to signal his Scottish heritage. Similarly, the English poet Bryan Waller Procter constructed his literary persona, 'Barry Cornwall,' as a direct allusion to the Cornwall peninsula.

Authors also utilized descriptive or characterological pseudonyms designed to mirror specific facets of their personal character or lifestyle.

A premier example from eighteenth-century American print culture is the pseudonym 'Poor Richard.' The annual periodical *Poor Richard's Almanack*, issued between 1732 and 1758 across the British North American colonies, achieved exceptional commercial and cultural resonance, offering readers highly practical insights and didactic moral maxims. It was a matter of public knowledge that this persona served as an alter ego for Benjamin Franklin–the eminent polymath, Enlightenment statesman, and civic leader.

Beyond characterological nomenclature, ludic or satirical pseudonyms designed primarily to generate comic or derisive effects gained significant traction. Notable historical examples include the actor-playwright David Garrick, who adopted the moniker 'Sir Nicholas Nipclose, Bart.' (punning on *nip* and *close*), and the pamphleteer William Cobbett, who chose the prickly persona 'Peter Porcupine.'

Furthermore, authors frequently resisted the constraints of a singular alias, embracing a fluid practice of polynymity by continuously fabricating new fictional identities. The genesis of these shifting pseudonyms was often intricately linked to evolving biographical circumstances, the distinct socio-literary contexts of their publications, or tributes to intimate personal relations.

The celebrated American novelist and screenwriter Michael Crichton published his earliest literary ventures under the pseudonym 'John Lange.' While pursuing his medical degree, Crichton was concerned that future patients might suspect him of exploiting their clinical histories for fictional material. The structural prototype for this alias was derived from the name of the British author and folklorist Andrew Lang; Crichton appended the letter 'e' to the surname and substituted his own first name, John. Under this specific moniker, Crichton issued his entire debut corpus of pulp thrillers, including *Odds On*, *Scratch One*, *Easy Go*, *Zero Cool*, *The Venom Business*, and *Grave Descend*.

Conclusions. The evolution of pseudonyms constitutes an ongoing search for adaptable linguistic forms that fulfill the human need for self-identification while simultaneously reflecting historical traditions, cultural customs, and contemporary societal trends in Azerbaijan, the UK and the USA.

The study of proper nouns (onomastics) remains perennially relevant due to the continuous and evolutionary nature of societal development, wherein names serve as a sociolinguistic mirror reflecting a nation's history and cultural heritage of all three countries.

The pedagogical applications of these findings are extensive; the results may be integrated into curricula for linguistics, cultural linguistics, translation theory and practice, and intercultural communication. Furthermore, the material is highly applicable for English language instruction across various educational tiers, including secondary schools, colleges, and institutions of higher education.

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DOI https://doi.org/10.30525/2592-8813-2026-2-58

NARRATIVE VOICE: CONSTRUCTING LANGUAGE AND CULTURAL IDENTITY IN POSTCOLONIAL NARRATIVES

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Abstract. This article examines the role of narrative voice in the construction of language and cultural identity within postcolonial narratives. Drawing upon the theoretical perspectives of Frantz Fanon, Edward Said and Bill Ashcroft, the study explores how postcolonial writers employ narrative strategies to articulate displacement, hybridity, fragmented identity, and cultural resistance. Particular attention is given to the relationship between narration, linguistic hybridity, memory, and historical trauma. Through the analysis of works by Mohsin Hamid, Kamila Shamsie, Bapsi Sidhwa, Sorayya Khan, and Bina Shah, the article demonstrates that narrative voice functions not only as a literary technique but also as a cultural and linguistic space where identity, belonging, and resistance are negotiated. The study further argues that contemporary postcolonial dystopian fiction expands these discussions through the representation of gender identity, surveillance, and ideological control. Ultimately, the article emphasizes that postcolonial narrative voice reconstructs marginalized cultural experiences while simultaneously challenging the ideological legacy of colonial discourse.

Key words: narrative voice, cultural identity, linguistic hybridity, postcolonial theory, cultural memory.

Introduction. Postcolonial narratives occupy a significant place within contemporary literary studies due to its engagement with colonial history, cultural displacement, migration, identity formation, and resistance to imperial discourse. Emerging from societies shaped by colonial domination, postcolonial literature frequently examines the psychological, linguistic, and cultural consequences of colonialism while simultaneously reconstructing silenced histories and marginalized perspectives.

Within this framework, narrative voice becomes one of the central literary mechanisms through which cultural identity is represented and negotiated. Narrative voice refers not only to the perspective through which a story is told, but also to the ideological, linguistic, and cultural position embedded within narration itself. In postcolonial fiction, narration often carries traces of displacement, hybridity, memory, and resistance, transforming storytelling into a space where individual and collective identities are reconstructed.

The relationship between narrative voice and cultural identity is particularly significant because postcolonial writers frequently reconstruct colonized experience through language itself. Rather than using English as a neutral medium, postcolonial authors reshape and hybridize the language of the colonizer through local expressions, untranslated words, oral storytelling traditions, and culturally specific forms of narration. Consequently, linguistic hybridity becomes an essential aspect of identity formation, reflecting the fragmented and negotiated condition of postcolonial subjectivity. Narrative voice therefore functions not merely as a stylistic device, but also as a linguistic space where cultural memory, resistance, and belonging are articulated.

This article aims to examine the role of narrative voice in constructing language and cultural identity in postcolonial narratives. The study employs a comparative and interdisciplinary methodological approach grounded in postcolonial theory, drawing upon the works of Frantz Fanon, Edward Said and Bill Ashcroft. Through the analysis of selected postcolonial novels, particularly from Pakistani English literature, the article explores how narrative voice reflects hybridity, fragmented identity, cultural memory, linguistic resistance, and gendered subjectivity within both realist and dystopian contexts.

Discussion. One of the major consequences of the postcolonial condition, namely mass displacement, migration, and assimilation, is a significant factor influencing the construction of cultural identity. These processes lead the postcolonial subject to confront problems of belonging, self-perception, and cultural affiliation, which are reflected through narrative voice in literary texts. We can analyze this issue through the theoretical perspectives of Frantz Fanon and Edward Said, whose approaches emerge as responses to colonial discourse grounded in the "us" versus "them" dualism. Edward Said characterizes the age as "the age of refugees, displaced persons, and mass migration" (Said, 2016) emphasizing that migration and displacement are inseparable aspects of the postcolonial condition. Within this context, narrative voice becomes a literary medium through which fragmented cultural experience, alienation, and the search for identity are articulated.

The emergence of displacement, migration, assimilation, and fragmented cultural identity within postcolonial societies cannot be examined separately from the ideological foundations of colonial discourse itself. The roots of this condition lie in the Eurocentric worldview that constructed hierarchical oppositions between the colonizer and the colonized and legitimized cultural, political, and intellectual domination through the "us" versus "them" binary.

European missionaries, intellectuals, scholars, and literary figures, who assumed the "burden" of bringing civilization and progress to the non-European world, simultaneously engaged in religious, educational, and medical activities while also studying local cultural traditions outside Europe. However, alongside these seemingly humanitarian activities, they contributed to the dissemination of colonial ideology and the dominant belief in the intellectual and cultural superiority of Europeans. In this way, colonial discourse legitimized not only political domination but also the physical and cultural exploitation of colonized peoples. Even after the collapse of the colonial system and the achievement of political independence by former colonies, the ideological foundations of colonialism continued to persist. As George Lamming observes, colonialism transformed into "a subtle and deeply rooted myth" (Ashcroft, 1995, p. 13) that could not easily be dismantled. The persistence of this dominant racial and cultural perception reveals that colonial ideology survived beyond formal imperial rule.

The formation and preservation of this ideology relied heavily on the "us" versus "them" dualism that became central to colonial discourse. Within this framework, the non-Western "other" was represented as racially, culturally, and historically inferior, yet simultaneously portrayed as fully knowable and classifiable through Western systems of knowledge. Such representations remained strikingly stable regardless of geographical or historical differences, reducing non-Western societies to fixed stereotypes. The works of Fanon and Said demonstrate that Orientalism and colonial representation functioned through this polarized perception, where the colonized world was viewed both as an object of scientific exploration and as a source of fantasy, myth, and obsession. Consequently, literature, journalism, science, and later cinema actively reinforced these binary oppositions and contributed to the normalization of imperial domination and discrimination.

The emergence of postcolonial thought in the second half of the twentieth century marked a significant challenge to these dominant Eurocentric narratives. Decolonization processes following the Second World War, including the independence movements in Asia and Africa, created a pluralistic intellectual environment that encouraged the rise of anti-colonial and postcolonial theory. Thinkers such as Said, Bhabha, Spivak, Robert J. C. Young, and Bill Ashcroft questioned not only colonial practices but also the philosophical foundations that sustained them. Their approaches emphasized hybridity, cultural interaction, resistance, and the instability of fixed identities. Rather than understanding culture within rigid binaries such as native/foreign or colonizer/colonized, postcolonial theory interprets cultural identity as hybrid, dynamic, and constantly shaped through interaction and negotiation.

Within this context, postcolonial literature became one of the principal spaces in which these tensions were articulated. Narrative voice, in particular, emerged as a significant literary strategy for expressing displacement, alienation, fragmented identity, and cultural resistance. The postcolonial

writer attempts simultaneously to rediscover historical roots, examine present realities, and reveal the colonial processes that shaped them. Both the colonial and postcolonial periods are therefore represented through narratives of physical, psychological, and cultural dislocation accompanied by struggles for survival, resistance, and self-definition. As a methodological approach rather than a unified theory, postcolonialism investigates the shared cultural experiences of societies shaped by colonial history while also emphasizing their distinctive historical and cultural conditions. In this sense, narrative voice becomes a medium through which postcolonial fiction reconstructs cultural and linguistic identity while simultaneously challenging the ideological legacy of colonial discourse through the transformation of language itself.

Within this system of controlled representation, where colonial discourse defined both the content and the limits of knowledge about the "Other," literature becomes a crucial site of resistance. Bill Ashcroft emphasizes that "The most persistent, widespread and effective revival of postcolonial resistance is the appropriation and transformation of dominant technologies for the purpose of reconstructing and re-presenting postcolonial identity, resisting erasure" (Ashcroft, 2001, p. 14). In this sense, postcolonial narrative strategies often involve the adoption and reconfiguration of the colonizer's language, forms, and thematic structures as a counter-discursive response to imperial representation. A clear illustration of this dynamic can be found in the contrast between Joseph Conrad's depiction of Africa in "Heart of Darkness" and Chinua Achebe's reconfiguration of Africa as a complex cultural and historical space in "Things Fall Apart", where the same discursive field is re-signified from within. In this process, narrative voice functions as an "answering back" to colonial discourse, directly engaging with and challenging the authority of imperial representation rather than remaining a passive site of description. Within this framework, narrative voice becomes closely connected with questions of power, cultural authority, and identity construction, as postcolonial writers resist Eurocentric narratives, reinterpret historical experience from the perspective of the colonized subject, and transform previously silenced voices into central agents of literary and cultural expression.

This resistance is not only thematic but also formal, as it becomes embedded in the structure of narrative voice itself, producing hybrid and fragmented modes of storytelling that reflect the instability of postcolonial identity. In this sense, narrative form moves beyond representation and begins to embody the very condition it describes, where identity is constructed through discontinuity, multiplicity, and cultural negotiation. Consequently, postcolonial narrative strategies foreground linguistic hybridity, fragmented selfhood, nonlinear narration, multiplicity of perspectives, and a persistent sense of cultural in-betweenness, all of which emerge as defining features of postcolonial subjectivity.

These aspects are clearly illustrated in "The Reluctant Fundamentalist" and "Burnt Shadows". In both novels, protagonists embody fragmented selfhood shaped by "cultural in-betweenness", where identity is continuously negotiated rather than firmly established.

In "The Reluctant Fundamentalist", Changez's fragmentation is particularly intense and ultimately unresolved. His identity evolves through several stages: initially, he is captivated by success in the United States and strives to assimilate into American society; however, after the events of 9/11, the increasing suspicion directed toward individuals of his racial and cultural background forces him into a position of conscious differentiation. In response, Changez attempts to assert his difference from Americans, most visibly through a change in his appearance – his beard – which becomes a symbolic marker of identity and a response to widespread stereotyping. It is therefore no coincidence that the novel begins with the lines: "Excuse me, sir, but may I be of assistance? Ah, I see I have alarmed you. Do not be frightened by my beard: I am a lover of America" (Hamid, 2007, p. 1). Within the "us" versus "them" dualism, the latter has consistently been stereotyped as the negative side. However, this overt act of resistance does not resolve his identity crisis; instead, it intensifies his sense of dislocation both in America and upon his return to Pakistan, where he still cannot fully locate a stable sense of belonging. As Fanon observes, "This culture, abandoned, sloughed off, rejected, despised, becomes

for the inferiorized an object of passionate attachment. There is a very marked kind of overvaluation that is psychologically closely linked to the craving for forgiveness" (Fanon, 1964, p. 41).

In contrast, "Burnt Shadows" presents a broader historical and transnational canvas in which identity is shaped through repeated displacement and global conflict. The novel follows characters across major historical ruptures, including the atomic bombing of Nagasaki, the Partition of India, and post-9/11 America. Within this shifting historical framework, the protagonist is repeatedly forced to adapt to new cultural environments, yet each transition is marked by loss, rupture, and reconfiguration of identity. Alongside her, her son Raza – born to a Japanese mother and a Pakistani father and raised in a multicultural environment – struggles to define a stable sense of self when confronted with global political suspicion, particularly in the United States, where he is racialized and perceived as a potential terrorist: "There was something that she learned to recognize after Nagasaki, after Partition: those who could step out from loss, and those who would remain mired in it. Raza was the miring sort, despite the inheritance he should have had from both his parents, two of the world's great forward-movers" (Shamsie, 2009, p. 146).

In both novels, identity is not presented as a unified essence but as a fractured and unstable process shaped by historical violence, migration, and cultural encounters. While Changez's fragmentation leads to unresolved internal and external conflict, Raza's trajectory similarly reflects the impossibility of fixed identity within a globalized postcolonial world. Together, these texts demonstrate how narrative voice constructs identity as inherently hybrid, unstable, and continuously negotiated within spaces of cultural in-betweenness.

In postcolonial fiction, narrative voice functions not merely as a means of storytelling but as a medium through which cultural experience, memory, and belonging are preserved and communicated. In this regard, literature possesses what scholars describe as the "ideological power of literature as a part of cultural process which may serve to create liberal or on the contrary, conservative outlook" (Hajiyeva, 2015, p. 51). Through narrative strategies, linguistic choices, and representations of identity, postcolonial writers participate in shaping cultural consciousness and social values. Rather than presenting culture through direct explanation, postcolonial authors frequently embed local traditions, forms of address, expressions, and untranslated words into narration itself, allowing the native voice to emerge from within the linguistic structure of the text. In this way, narration carries traces of collective memory and cultural experience that cannot be fully reproduced through standardized language alone. Bill Ashcroft emphasizes that the use of untranslated words performs an important function in expressing cultural difference because "they signify a cultural experience which can no longer be recreated, but whose existence is validated by the new situation" (Ashcroft, 2001, p. 78).

This approach is particularly visible in the works of Bapsi Sidhwa, where English becomes a literary space shaped simultaneously by Urdu, Gujarati, and local cultural traditions. In her fiction, local expressions and culturally specific forms of address are preserved within English narration, transforming language into a hybrid narrative medium capable of carrying multiple cultural experiences at once. A similar narrative strategy can be observed in "Noor" and "Burnt Shadows", where native linguistic forms are retained particularly in the representation of family relations and emotional intimacy. In "Noor", Sorayya Khan describes the encounter between Sajida and her unborn child through the words: "Ammi", she called in a high pitched voice of a young child registering an all consuming need for her mother" (Khan, 2003, p. 11). Similarly, in "Burnt Shadows", Kamila Shamsie writes: "Yes, Aba," Raza said automatically. "Every father in this neighbourhood of migrants, each with stories of all they had lost and all they had started rebuild after Partition, made a similar speech to his son" (Shamsie, 2009, p. 136). In both examples, the use of the Urdu words "Ammi" and "Aba" instead of their English equivalents "mother" or "father" is far from accidental. These expressions carry profound semantic and emotional meanings rooted in cultural memory, intimacy, and collective experience, preserving dimensions of identity that cannot be fully conveyed through direct translation.

The same narrative voice also carries the historical trauma of displacement and Partition. Describing the division of the subcontinent, Bapsi Sidhwa writes: "Playing British gods under the ceiling fans of the Falettis Hotel – behind Queen Victoria's gardened skirt – the Radcliffe Commission deals out Indian cities like a pack of cards. Lahore is dealt to Pakistan, Amritsar to India. Sialkot to Pakistan, Pathankot to India" (Sidhwa, 1989, p. 140). The ironic and emotionally charged narrative tone transforms political history into lived cultural experience, demonstrating how postcolonial narration intertwines personal memory with collective historical trauma. In this sense, narrative voice becomes a space where displacement, belonging, and cultural continuity are negotiated through the persistent presence of the native voice within the language of the colonizer.

The fragmentation of identity in postcolonial fiction becomes particularly visible in the representation of gender within dystopian settings. While hybridity reflects cultural and historical division, dystopian narratives intensify these tensions by placing gender identity under systems of ideological, political, and patriarchal control. As a result, narrative voice becomes a significant medium through which female subjectivity, resistance, and psychological conflict are articulated.

In many postcolonial dystopian texts, women occupy contested spaces between tradition and autonomy, visibility and erasure, and collective morality and individual identity. The dystopian environment frequently transforms the female body into a site of regulation and symbolic control, reflecting broader anxieties surrounding nationalism, cultural preservation, and patriarchal authority. Through subjective narration and psychologically charged perspectives, these works reveal how gender identity is shaped not only by colonial histories but also by internal social structures that continue forms of domination in postcolonial societies.

Contemporary Pakistani dystopian fiction particularly demonstrates this intersection between gender identity and narrative fragmentation. "Before She Sleeps" by Bina Shah presents a society in which women's identities are politically regulated and reduced to social function. The psychological consequences of such control are reflected through narrative voice and the suppression of memory itself: "You wouldn't survive if you couldn't accept where you were, if you kept clinging to the past like a life jacket. You had to somehow override the memories, otherwise they would seep into your dreams and torture you in your sleep" (Shah, 2018, p. 29). Here, memory becomes both a source of identity and a psychological burden, illustrating how dystopian systems attempt to erase personal history in order to sustain ideological authority.

At the same time, contemporary dystopian narratives increasingly move beyond traditional representations of hopelessness. As critics observe, such works "Redefine the conventional notion of dystopia from merely a bleak and inhospitable place to one characterized by struggle and optimism" (Hajiyeva, 2024, p. 252). Rather than portraying passive suffering, these narratives emphasize resilience, empowerment, and the emergence of resistant subjectivities. This transformation is especially important in narratives centered on women, where dystopian oppression simultaneously exposes the mechanisms of patriarchal control and creates space for the reconstruction of female agency.

The relationship between dystopian fiction and gender identity becomes even more significant within postcolonial contexts. Although dystopian fiction traditionally relies on imagined futures and speculative worlds, Pakistani English dystopian narratives often require limited imaginative distance because many of the issues they explore – gender inequality, surveillance, social restriction, and cultural pressure – already exist within contemporary social realities. In this regard, dystopian settings function less as distant fantasies and more as intensified reflections of existing societal anxieties.

Furthermore, as professor V. Aghabayli has emphasized, "..gender equality knows no geographical or cultural boundaries" (Aghabayli, 2024, p. 337). She further highlights the "…enduring importance of diverse voices in shaping our understanding of gender in literature and society" (Aghabayli, 2024, p. 4013). From this perspective, the exploration of narrative voice and identity formation within postcolonial dystopian fiction contributes a new dimension to contemporary gender studies.

Such narratives demonstrate how female voices negotiate cultural fragmentation, historical trauma, and patriarchal systems while simultaneously reconstructing identity through storytelling itself.

Finally, dystopian fiction also foregrounds the relationship between identity and the construction of space and time. As it is noted, "Within the realms of utopia/dystopia, where authors' imaginations run free, the creation of an imaginary world inherently involves the construction of space and time" (Hajiyeva, 2024, p. 4003). In postcolonial dystopian narratives, however, these imagined spaces often mirror recognizable social realities, allowing authors to critique existing gender structures through speculative forms. Consequently, narrative voice becomes not only a tool of personal expression, but also a means of exposing the cultural and ideological conditions that shape gendered identity in postcolonial societies.

Conclusion. Narrative voice occupies a central position in postcolonial narratives as a literary strategy through which language, cultural identity, and historical experience are reconstructed. The analysis demonstrates that postcolonial narration extends beyond the function of storytelling and becomes a space where displacement, hybridity, fragmented identity, memory, and resistance are articulated. Through subjective perspectives, multilingual narration, and culturally specific linguistic forms, postcolonial writers reshape the language of the colonizer and transform it into a medium capable of expressing local histories and collective cultural experience.

The study further reveals that narrative voice functions as a form of ideological resistance against colonial discourse and its binary constructions of identity. By challenging Eurocentric representations and restoring marginalized perspectives, postcolonial fiction reconstructs the voices historically excluded from dominant narratives. In this context, hybridity and fragmentation emerge not as signs of cultural loss alone, but also as expressions of negotiation, adaptation, and identity formation within postcolonial societies.

Moreover, the inclusion of dystopian fiction expands contemporary discussions of narrative voice by foregrounding questions of gender identity, surveillance, and ideological control. Pakistani English dystopian narratives particularly demonstrate how female subjectivity is shaped within structures of political and patriarchal domination while simultaneously creating possibilities for resistance and self-definition. Consequently, narrative voice becomes both a reflection of postcolonial reality and a mechanism through which cultural identity is continuously reimagined.

Furthermore, the transformation and hybridization of English within postcolonial narration demonstrates how language itself becomes a site of cultural negotiation and identity formation. Ultimately, postcolonial fiction contributes significantly to global literary discourse by presenting diverse cultural experiences through innovative narrative forms. The role of narrative voice in constructing language and cultural identity therefore remains essential for understanding how literature negotiates memory, belonging, and resistance in postcolonial societies.

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DOI https://doi.org/10.30525/2592-8813-2026-2-59

MEMORY, UNRELIABLE NARRATION, AND THE TRANSFORMATION OF THE BILDUNGSROMAN IN JULIAN BARNES'S "THE SENSE OF AN ENDING"

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Abstract. The postmodern bildungsroman challenges the traditional understanding of growing up as a linear and objective process. This article examines the characteristics of the postmodern bildungsroman in Julian Barnes's novel "The Sense of an Ending". The study explores the transformation of the classic novel about identity formation within a postmodern narrative structure. Using genre analysis, narratological interpretation, and close reading, the study examines the novel's non-chronological temporality, unreliable narration, and the relativity of memory and truth.

In contrast to the traditional depiction of the protagonist's life as a strictly chronological sequence, the narrative unfolds retrospectively and fragmentarily through the memories of the protagonist, Tony Webster. The analysis reveals that growing up in the novel is neither progressive nor harmonious, but retrospective, morally unsettling, and incomplete. Tony's rethinking of his past reveals the instability of personal history and calls into question the possibility of a coherent self-formation.

The findings suggest that Barnes reimagines the bildungsroman as a narrative of epistemological uncertainty rather than achieved integration, thus demonstrating the genre's postmodern transformation.

Key words: bildungsroman, postmodernism, identity formation, memory, unreliable narration, retrospective memory.

Introduction. Julian Barnes's literary works are distinguished by their rich use of postmodern elements. His novel, "The Sense of an Ending", is considered one of the most significant works of 21st-century British literature and won the Man Booker Prize in 2011. The narrative centers on Tony Webster, a retired historian whose flashbacks form the core of the novel. Divided into two parts, the novel begins with the protagonist's school memories, gradually moving to deeper reflections on his past and personal responsibility.

Problem statement. Despite numerous studies of Julian Barnes's work, the genre status of "The Sense of an Ending" as a postmodern transformation of the bildungsroman remains under-systematized. While the novel is often analyzed from the perspectives of memory studies, unreliable narration, and historiographic metafiction, few studies explicitly consider how Barnes rethinks the structural and epistemological principles of the classic bildungsroman (Childs, 2011; Moseley, 2015). In particular, a systematic analysis of the interplay between retrospective narration, ethical ambiguity, and the temporality of identity is lacking, leaving the postmodern aspects of the bildungsroman under-explored. Unlike the classic bildungsroman, postmodern narratives emphasize epistemological uncertainty, ethical ambiguity, and retrospective self-reflection, making a comparative framework necessary for understanding the novel's contribution to the genre.

This study focuses on the epistemological and temporal aspects of the genre, exploring how Barnes transforms the traditional bildungsroman through narrative unreliability, retrospective temporality, and ethical ambiguity.

The traditional bildungsroman presents coming-of-age as a sequential and progressive development of the individual within society (Buckley, 1974). However, in postmodern literature, this linear model is fragmented and destabilized (Hutcheon, 1988; Lyotard, 1984). In Barnes's novel, com-

ing-of-age is presented as retrospective, uncertain, and incomplete, raising the question of whether authentic formation is achievable in a postmodern context. Here, the bildungsroman is viewed not only as a narrative of personal growth but also as a historically conditioned literary system whose structural logic can be reshaped.

Research questions. This study aims to answer the following questions:

1. How does "The Sense of an Ending" rethink the structural model of the classic bildungsroman, particularly its teleological and temporal logic?

2. How do memory, unreliable narration, and fragmented temporality alter the process of coming of age in the novel?

3. Does Tony Webster ultimately achieve self-realization, or does the narrative problematize the very possibility of closure, illustrating a postmodern restructuring of the bildungsroman?

Relevance of the study. The relevance of this study lies in the growing scholarly interest in the transformation of traditional genres in postmodern contexts. As contemporary fiction increasingly questions stable identities, historical objectivity, and narrative authority, rethinking the bildungsroman within a postmodern framework acquires theoretical significance (Golban, 2018; Waugh, 1984). Moreover, Barnes's novel convincingly demonstrates how personal memory intersects with genre conventions (Ricoeur, 2004), demonstrating that the bildungsroman in a postmodern context embraces both epistemological uncertainty and ethical self-reflection.

Aim and objectives. The purpose of this article is to explore the key characteristics of the postmodern bildungsroman in Julian Barnes's novel "The Sense of an Ending", focusing on its structural, epistemological, and temporal transformations.

To achieve this goal, the following objectives are set:

– to outline the theoretical foundations of the classical and postmodern bildungsroman;

– to analyze the novel's narrative structure, focusing on temporality, retrospection, and ethical issues;

– to examine the role of memory and unreliable narration in shaping the protagonist's development;

– to determine whether the process of coming of age in the novel is complete or fundamentally fragmented, and how this reflects postmodern transformations of the genre.

Methodology. The study utilizes genre analysis, narratological interpretation, and elements of comparative literary studies. The theoretical framework draws on classical theories of the bildungsroman (Buckley, 1974; Dilthey, 1985) and contemporary approaches to postmodern narrative, particularly concepts related to fragmented identity, unreliable narration, and the relativity of historical truth (Hutcheon, 1988; Lyotard, 1984; Ricoeur, 2004). This approach allows for a comprehensive understanding of the novel as a work of fiction and as a systematic restructuring of the principles of literary genre.

Novelty of the research. The novelty of this study lies in its comprehensive approach to the novel as a postmodern bildungsroman. Rather than viewing memory and narrative as isolated themes, the article demonstrates how these elements structurally function, transforming the genre itself (Golban, 2018). It highlights the epistemological and ethical dimensions of the bildungsroman, situating Barnes's work within the broader context of postmodern narrative theory.

Structure of the article. This article is structured as follows: first, it outlines the theoretical evolution of the bildungsroman from its classical form to its postmodern reinterpretation; second, it analyzes the key narrative and thematic elements of "The Sense of an Ending", focusing on retrospective narration, epistemological instability, and ethical self-reflection; and finally, it assesses the extent to which the novel conforms to or violates genre conventions, demonstrating the transformation of the traditional bildungsroman into a postmodern form.

Materials and methods. The study is based on qualitative literary analysis and utilizes an interdisciplinary methodological framework combining genre theory, narratology, and postmodern literary criticism (Hutcheon, 1988; Waugh, 1984).

The primary method employed in this study is genre analysis, which identifies the structural and thematic characteristics of the classic bildungsroman and compares them with their transformation in the postmodern context (Buckley, 1974; Dilthey, 1985). This approach allows us to examine how traditional formative elements such as linear development, social integration, and harmonious self-realization, are modified in Julian Barnes's short story "The Sense of an Ending".

Furthermore, the article utilizes narratological analysis, particularly with an emphasis on temporality, retrospective narration, and unreliable narration (Hutcheon, 1988; Ricoeur, 2004). Particular attention is paid to the fragmented structure of memory and the instability of narrative perspective, which play a central role in shaping the protagonist's maturation.

The study also utilizes close reading and analysis of key passages in the novel to demonstrate the interplay of memory, self-perception, and historical awareness within the narrative. Selected quotes from the novel serve as textual evidence supporting the study's theoretical arguments.

From a theoretical perspective, the study draws on classical theories of the bildungsroman (Buckley, 1974; Dilthey, 1985), as well as contemporary interpretations of the postmodern formative novel (Golban, 2018; Hutcheon, 1988; Lyotard, 1984). Concepts such as fragmented identity, the relativity of truth, and the crisis of historical objectivity form the conceptual framework of the analysis.

Study is qualitative in nature and does not rely on quantitative data. His findings are based on an interpretive analysis of the narrative structure, thematic development, and character formation in the novel (Barnes, 2011; Ricoeur, 2004).

Literature review. The bildungsroman, which has taken various forms in accordance with historical processes, has undergone significant transformations in different literary periods.

The term "bildungsroman" was first systematically theorized by Wilhelm Dilthey, who defined it as a narrative of individual development shaped by experience and social interaction (Dilthey, 1985). Later, Jerome Hamilton Buckley described the genre as a story of adolescence, conflict, self-discovery, and subsequent integration into society (Buckley, 1974). These foundational definitions emphasize linear development, the integrity of identity, and reconciliation between the individual and the social order. These classical conceptualizations presuppose both epistemological stability and chronological clarity as necessary conditions for the bildungsroman.

From Dilthey's early works, "Poetry and Experience", to Buckley's "Season of Youth" the bildungsroman was initially viewed as a genre that flourished in 19th-century European literature. However, 20th-century literary trends significantly transformed the genre. Modernist and postmodern aesthetics disrupted the linear teleology that traditionally defined the structure of the developmental novel. As Boes (2006) argues, the 20th-century bildungsroman has increasingly shifted toward narratives of crisis, fragmentation, and instability, particularly in postcolonial and minority literatures. Rather than harmonious integration, modern and postmodern versions often highlight alienation and incompleteness. While Boes (2006) and Golban (2018) provide valuable overviews of the evolution of the bildungsroman, this study emphasizes Barnes's specific narrative strategies, aligning the analysis closely with "The Sense of an Ending" rather than with generalizations about the genre.

The bildungsroman, deeply influenced by the twentieth century, gradually shifted its focus from class struggle and social mobility to issues of self-identity and psychological formation. This shift highlights the epistemological dimension of postmodern formation: identity becomes temporary, memory unreliable, and maturation nonlinear.

In postmodern contexts, identity itself becomes unstable. Linda Hutcheon (1988) notes that postmodern fiction questions grand narratives and stable truths, thereby destabilizing traditional models of development. Similarly, Jean-François Lyotard (1984) emphasizes the decline of metanarratives, which directly impacts the teleological structure of the classic bildungsroman. While maturation once implied coherence and unity, postmodernism redefines it as fragmented, temporal, and ethically ambiguous. This transformation indicates that the bildungsroman is no longer purely developmental

but also epistemological: the process of formation involves uncertainty, interpretive plurality, and constant ethical reflection.

This transformation also impacts narrative technique. Unreliable narration, temporal disruptions, and the fragmentation of memory become central means of representing subjectivity. According to Ricoeur (2004), memory is not a stable archive, but a reconstructive process shaped by ongoing consciousness. This understanding of memory undermines the objective retelling of the past and introduces epistemological uncertainty into the narrative of development. In this sense, the postmodern bildungsroman utilizes narrative instability as a structural tool for rethinking both self-knowledge and moral understanding.

For this reason, in the postmodern bildungsroman, the period of perfection is often expressed through psychological and introspective processes rather than through external achievements. Golban (2018) argues that the bildungsroman should be understood not as a fixed genre, but as a dynamic literary system that develops historically. This perspective allows us to view contemporary novels as transformations, not simply deviations from the classical model. Barnes's novel, in particular, illustrates how the epistemological instability of memory and the ethical uncertainty of retrospective judgment can constitute the very mechanism through which bildungsroman is realized in postmodern literature.

In this theoretical context, Julian Barnes's novel "The Sense of an Ending" occupies a special place. Although the novel has often been examined within the context of memory, historiography, and unreliable narrative (Childs, 2011; Moseley, 2015), far fewer studies explicitly situate it within the framework of the postmodern bildungsroman. The novel's retrospective structure, its fragmented temporality, and the protagonist's late-life reappraisal of past events suggest a rethinking of the traditional narrative of identity formation. In other words, Barnes demonstrates that coming of age in a postmodern context is not a teleological achievement, but an ongoing epistemological and ethical process.

Unlike the classic bildungsroman, where development culminates in social harmony, Barnes presents coming of age as a belated, painful, and morally ambiguous phenomenon. The protagonist's development occurs not through gradual social integration, but through the destabilization of memory and self-perception. Thus, existing research provides valuable insights into memory and narrative in Barnes's works, yet systematic genre analysis remains limited. This study contributes to addressing this gap by examining how Barnes uses narrative structure and memory to transform the conventions of the bildungsroman into a postmodern model of identity formation.

Analysis and discussion. Julian Barnes's novel "The Sense of an Ending" contains many of the aforementioned characteristics of the postmodern bildungsroman. However, its distinctive feature lies not only in its thematic similarities but also in its structural transformation. Barnes doesn't simply reproduce the formative model; he restructures it, destabilizing its epistemological and teleological foundations through retrospective narration and narrative unreliability.

Before considering the novel's genre transformation, it's necessary to outline the structural principles of the classic bildungsroman. Traditionally associated with a developmental model exemplified by Johann Wolfgang von Goethe, the genre is based on teleological progress. The protagonist's life unfolds along a linear timeline, in which youthful experiences gradually lead to maturity, reconciliation, and social integration. Development is cumulative and progressive; each stage of life contributes to the strengthening of identity.

Within this paradigm, formation presupposes epistemological stability. Experience generates knowledge, knowledge generates self-awareness, and self-awareness ensures harmonious inclusion in society. Narratives typically conclude with a denouement, where internal conflict is resolved and the individual achieves equilibrium with the external world. Thus, teleology, linear temporality, social adaptation, and a coherent identity constitute the structural coordinates of the classical model.

Barnes's novel systematically destabilizes each of these coordinates. Instead of advancing toward integration, the narrative moves backward through memory; instead of strengthening identity,

it exposes its fragility; instead of closure, it culminates in anxiety. Therefore, the transformation of the bildungsroman in "The Sense of an Ending" can be understood as a structural reorganization of its founding principles.

Having outlined the structural premises of the classic bildungsroman, Barnes now turns to an analysis of how he reconfigures these foundations within the novel's narrative architecture: "We sat in the classroom, listening to the teacher, while Adrian whispered jokes behind our backs and Veronica rolled her eyes at him" (Barnes, 2011, p. 12). This scene illustrates the early stage of social formation typical of the classic bildungsroman. Tony's interactions with Adrian and Veronica reflect his evolving understanding of himself and others. In traditional models, such experiences gradually foster mature self-knowledge and social integration. Barnes, however, presents them retrospectively, emphasizing that Tony's memories are selective and sometimes distorted. Thus, formation becomes unstable, retrospective, and epistemologically problematic. This underscores the postmodern restructuring of the bildungsroman: development ceases to be teleological, and self-realization occurs belatedly, intertwined with ethical and moral ambiguity.

The transformation occurs not only at the level of superficial motifs; rather, it unfolds through a systematic disruption of teleology, temporality, and epistemological stability. The subsequent analysis examines how retrospective narration becomes the primary mechanism through which this structural shift is accomplished.

The key feature that distinguishes the classic bildungsroman from other genres is the protagonist's spiritual development and maturation. As Buckley (1974) argues, classic coming-of-age implies progressive development culminating in social integration. In traditional models, such as those associated with Johann Wolfgang von Goethe –development follows a linear trajectory, in which experience gradually leads to self-knowledge and harmony between the individual and society. However, in Barnes's novel, this teleological sequence is disrupted. The protagonist's development does not unfold chronologically, but is reconstructed retrospectively through memory, which proves unreliable and selective.

Tony's reflections on history provide a clear example of this epistemological instability: "History is that certainty produced at the point where the imperfections of memory meet the inadequacies of documentation" (Barnes, 2011, p. 17). This assertion demonstrates that memory and documentation are inherently unreliable, challenging the classic bildungsroman assumption that experience gradually leads to stable self-knowledge. Here, Barnes reimagines formation as a process arising from the awareness of distortions, rather than from cumulative clarity.

Tony's memories are often incomplete or distorted. This unreliability becomes apparent when missing letters and forgotten details fundamentally alter the reader's understanding of earlier events: "I blamed Veronica for everything, and Adrian, well, he just amused himself at my expense" (Barnes, 2011, p. 28). This passage illustrates Tony's early moral and emotional development, a key feature of the bildungsroman. His perception of Adrian and Veronica demonstrates a subjective and partial understanding, shaping his retrospective narrative. In a classic bildungsroman, such relational conflicts would gradually lead to self-knowledge and ethical growth. However, in Barnes's postmodern version, the narrative emphasizes Tony's selective memory and misinterpretation, demonstrating that identity formation is incomplete and ethically ambiguous. The scene emphasizes that maturation occurs through memory and reflection, not through direct social integration.

Initially, Tony presents himself as a passive victim, particularly in relation to Veronica and Adrian. However, the subsequent revelation of his cruel and vindictive letter destabilizes this self-image (Barnes, 2011). Thus, the narrative dramatizes the instability of self-perception. In a classic bildungsroman, self-knowledge gradually improves; here, this is belatedly corrected.

However, this belated correction does not lead to reconciliation. Tony's admission of his moral error creates discomfort rather than harmony. Reflecting on this, he says "You are allowed a long

moment of pause, time enough to ask the question: what else have I done wrong?" (Barnes, 2011, p. 149). The rhetorical question resists closure. Instead of confirming achieved maturity, it opens a continuous process of ethical analysis. Here, the transformation of the genre becomes evident: maturity is reimagined as persistent self-doubt rather than stable self-integration.

Veronica's repeated remark – "You just don't get it, do you?" (Barnes, 2011, p. 73) – further reinforces this anti-teleological structure. In classic models, the protagonist ultimately "gets it": understanding signals closure. In Barnes's novel, even reflection in adulthood fails to produce full understanding. Age does not guarantee wisdom, experience does not guarantee insight. This constant interpretive failure reconfigures the endpoint of development. The narrative misses that final moment of clarity that traditionally concludes the bildungsroman.

This persistent inability to understand extends beyond interpersonal misunderstandings and reaches the level of self-perception within narrative. If the protagonist repeatedly "doesn't understand", the question arises whether the limitation lies not only in interpreting others but also in constructing one's own identity. Thus, the instability of understanding points to a deeper ontological instability inherent in the act of narration itself.

The genre's transformation occurs not only at the level of temporality but also at the level of narrative ontology. The novel's first-person retrospective structure foregrounds the act of self-construction. Tony doesn't simply remember events, he narrativizes them. His identity emerges as a product of narrative, shaped and reshaped through selective recollection.

Memory in the novel functions as a creative, rather than reproductive, force. Each act of recollection reorganizes the past, creating alternative versions of the self. Consequently, identity loses its ontological coherence. The self is not a stable entity discovered through experience, but a temporary construct sustained by narrative coherence. When omitted details emerge, coherence collapses, revealing the fragility of personal identity.

In the classic bildungsroman, self-knowledge presupposes the existence of a coherent self awaiting realization. However, in "The Sense of an Ending", the self is constituted through narrative mediation and therefore remains inherently unstable. Identity formation culminates not in ontological certainty, but in a heightened awareness of narrative insufficiency. The protagonist's maturity lies not in self-mastery, but in the recognition that the self he created was incomplete.

Another key feature of the classic genre is the tension between the individual and society, typically resolved through adaptation. In contrast, Tony's central conflict arises not from social opposition, but from the discrepancy between memory and factual truth. His professional identity as a historian reinforces this irony. Having once defined history as a "version of events", he is forced to confront the instability of his own narrative (Barnes, 2011).

The conflict is internal and epistemological, not social. Thus, the axis of formation shifts from external integration to internal reassessment. Recalling his past, Tony begins to perceive memory as a collection of disparate impressions. This perspective is consistent with the idea that memories are reconstructive rather than reproductive. The novel dramatizes this through gradual uncovering and narrative gaps. Each return to the past generates a reinterpretation rather than a confirmation. If retrospection replaces linear development, then the very temporal logic of formation requires rethinking. The novel's narrative structure suggests that development is not synchronized with life experience, but is delayed, fragmented, and reinterpreted over time. This shift forces a reconsideration of when and how the bildungsroman can occur within a postmodern framework. Consequently, development occurs retrospectively. The protagonist is shaped not by experience at the moment of its occurrence, but by its subsequent reinterpretation. This retrospective structure fundamentally alters the temporal logic of the bildungsroman.

One of the most significant departures from the classical paradigm is the shift in the process of formation from adolescence to late adulthood. In the traditional bildungsroman, maturation occurs during

the formative years; growth is synchronized with chronological development. However, in Barnes's novel, understanding emerges not at the moment of lived experience, but decades later, through retrospective reconstruction. Adolescence does not produce insight, it produces misinterpretation.

Tony's ethical awakening is belated. His awareness of responsibility occurs only after the destabilization of his self-narrative. Thus, the novel's temporal structure inverts the classical model: development is no longer developmental, but corrective. Instead of moving toward clarity, the protagonist returns to the past to revise it. Formation becomes an act of rereading, not living.

This temporal shift redefines the very meaning of bildungsroman. If classical formation implies continuity between experience and maturity, Barnes introduces a discontinuity. Time does not guarantee wisdom; aging does not guarantee understanding. Maturity is not a natural result of chronological progress, but a painful consequence of an epistemological rupture. The protagonist is "formed" not through harmonious growth, but through a belated confrontation with his own distortions.

In the postmodern transformation of the genre, maturity becomes psychological rather than social. Tony's late realization does not lead to reintegration or external transformation. Instead, it generates ethical anxiety. The final lines of the novel highlight this shift: "Accumulation. Responsibility. And beyond these, there is unrest. There is great unrest" (Barnes, 2011, p. 149). The repetition of "uneasiness" replaces the classical harmony of finality with moral shock. Formation continues, but its outcome is no longer equilibrium; it is a heightened awareness of responsibility.

Thus, "The Sense of an Ending" does not abandon the tradition of the bildungsroman. Development still occurs, and self-knowledge remains central. However, Barnes transforms the structural logic of the genre. Linear teleology is replaced by retrospective reconstruction; social integration gives way to ethical ambiguity; certainty gives way to epistemological instability. Thus, the novel illustrates not the disintegration of the bildungsroman, but its postmodern transformation.

Taken together, these structural shifts as temporal, epistemological, and ontological demonstrate that Barnes is not simply adapting the bildungsroman to contemporary conditions. He is reconsidering its fundamental logic. The theme of formation remains, but its development no longer culminates in reconciliation, but leads to ethical contradictions and narrative uncertainty. The genre survives, but only through transformation.

Conclusion. In conclusion, Julian Barnes's novel "The Sense of an Ending" can be assessed not only as a postmodern narrative but also as a deliberate transformation of the bildungsroman tradition. This study demonstrates the usefulness of integrating narratological, ethical, and genre analysis to understand the postmodern transformations of the bildungsroman. The novel demonstrates how genre can be reimagined through retrospective narration, epistemological uncertainty, and ethical ambiguity, demonstrating that the bildungsroman remains a dynamic literary system rather than a fixed form.

The analysis reveals that the novel not only depicts a life story but also questions the very principles of formation. Rather than presenting adulthood as a harmonious integration into society, Barnes portrays it as a delayed, morally troubling, and psychologically fragmented process. This underscores the shift from classical teleological progression to a postmodern understanding of bildungsroman, in which self-formation is contingent, tentative, and mediated by interpretation. The narrative contains traces of the postmodern bildungsroman during the periods of childhood, travel, and late adulthood. However, these structural phases are no longer linear stages leading to social harmony; instead, they function as narrative experiments in temporality, memory, and ethical self-reflection. The stages of adolescence, experience, and maturity are reimagined as fragmented, retrospective moments whose meaning emerges only through selective memory and ongoing narrative reconstruction.

The key characteristics of the postmodern bildungsroman – non-chronological temporality, the relativity of memory and truth, unreliable narration, and the protagonist's inability to fully understand themselves – are manifested not only thematically but also structurally, illustrating the epistemological and ontological aspects of modern self-formation. In Barnes's novel, identity formation is not an

achieved state, but a process of continuous self-analysis and ethical struggle. Identity is temporary, knowledge is mediated, and moral insight is belated, which connects the narrative to contemporary theories of postmodern subjectivity and the instability of lived experience.

Ultimately, "The Sense of an Ending" demonstrates that the bildungsroman is not outdated, but adaptable. Development remains a thematic concern, but it no longer culminates in resolution or social integration. Instead, the genre survives through transformation, embracing ethical ambiguity, narrative uncertainty, and the temporality of identity as defining features. Thus, the postmodern bildungsroman, as demonstrated here, is a narrative of ongoing self-reflection, in which the process of bildungsroman itself becomes as significant as its hypothetical end result.

Future research could explore comparative approaches to other contemporary novels that similarly destabilize classical formation, examining how postmodern literary strategies – retrospective narration, ethical ambiguity, and epistemological uncertainty –redefine the trajectory of personal and social development.

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DOI https://doi.org/10.30525/2592-8813-2026-2-60

WORD CHOICE PROBLEMS IN LITERARY TRANSLATIONS FROM GERMAN INTO AZERBAIJANI TURKISH

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Abstract. This study examines word choice problems in literary translations from German into Azerbaijani Turkish in terms of translation theory, cultural transfer, and stylistic structure. A qualitative research method was employed in the study; historical sources, translation theories, and literary works translated from German into Azerbaijani Turkish were analyzed through a comparative textual analysis method. Within the scope of the research, the semantic, aesthetic, and stylistic problems caused by synonyms, antonyms, homonyms, and polysemous words during the translation process were discussed, and the necessity for translators to develop context-appropriate equivalence strategies was demonstrated through examples from the works of writers such as Goethe, Remarque, and Zweig. The findings reveal that success in literary translation depends not only on transferring the literal meanings of words, but also on reconstructing the emotional atmosphere, cultural connotations, and aesthetic structure of the text in the target language. The study emphasizes the importance of contextual and cultural analysis in literary translations between German and Azerbaijani Turkish.

Key words: Literary translation, word choice, equivalence, German–Azerbaijani Turkish translations, synonymy, antonymy, homonymy, polysemy.

Introduction. Translation is not merely the process of transferring oral or written expressions from one language into another; it is also a multidimensional communicative activity that enables the exchange of knowledge, ideas, aesthetic values, and worldviews between cultures. Literary translation, in particular, is regarded as one of the most complex fields of translation studies because it requires the reconstruction not only of meaning, but also of the emotional atmosphere, aesthetic structure, cultural connotations, and the author's stylistic features within the target language. Research conducted in the global scholarly literature on translation theory demonstrates that issues such as equivalence, fidelity, cultural transfer, foreignization, domestication, and stylistic transmission constitute some of the central problems of literary translation. Especially in translations carried out between languages belonging to different language families, the problem of word choice becomes more prominent in terms of semantic shifts and aesthetic losses.

The structural, cultural, and semantic differences between German and Azerbaijani Turkish further transform word choice into a significant problem area within the literary translation process. The contrast between the syntactic density and conceptual precision of German and the rhythmic, metaphorical, and emotionally expressive structure of Azerbaijani Turkish requires translators to produce creative solutions not only on the linguistic level but also on the cultural and aesthetic levels. Nevertheless, studies concerning the transfer of synonyms, antonyms, homonyms, and polysemous words in literary translations from German into Azerbaijani Turkish remain limited. This situation increases the scholarly significance of the present research.

The aim of this study is to examine word choice problems in literary translations from German into Azerbaijani Turkish from the perspectives of translation theory, equivalence, and style, and particularly to reveal the semantic and aesthetic problems caused by synonyms, antonyms, homonyms, and polysemous words during the translation process. Through selected examples from the works of German authors such as Goethe, Remarque, and Zweig, the study evaluates translators' context-

appropriate word choice strategies and concludes that success in literary translation depends not only on the transfer of meaning, but also on reconstructing the aesthetic and cultural structure of the text in the target language.

The Historical Development of Translation and Its Role in Intercultural Communication

Translation, as one of the oldest cultural and communicative activities in human history, is not merely the process of transferring words and expressions from one language into another, but also a fundamental civilizational practice that enables the circulation of knowledge, ideas, beliefs, aesthetic values, and cultural experiences among civilizations. The need for communication that emerged as human communities became divided into different languages transformed translation into an indispensable instrument of intercultural relations throughout history. In this respect, translation is regarded not only as a linguistic transfer, but also as a creative and multidimensional activity that sustains intercultural communication, intellectual interaction, and historical continuity. Goethe's definition of translation as one of the most important means of communication among people clearly demonstrates its historical and social function (Nəzərova, 2021, pp. 261-262). As reflected in the narrative of the Tower of Babel, humanity's division from a common language into different languages has been interpreted as a symbolic indication of cultural fragmentation; consequently, translation has been considered a fundamental mechanism of communication that eliminates alienation among different communities (Kızıltan, 2000, p. 71). Therefore, the history of translation can also be read as the history of humanity's effort to understand one another, transcend cultural boundaries, and establish a common intellectual sphere.

The origins of translation activities date back to very ancient times. According to Bayramov's studies, the discovery of the earliest written translation examples in ancient Egypt demonstrates that translation activities emerged during the earliest stages of human history (Bayramov, 1978, p. 7). War records, commercial documents, and religious texts dating back to the third millennium BCE reveal that translation initially functioned not only as a cultural practice but also as an application arising from administrative, military, and economic necessities. The Aswan inscriptions, which indicate that the princes of Elephantine also served as interpreters, show that translation and interpreting held an important social and political position in ancient Egypt (Nəzərova, 2021, p. 262). Clay tablets discovered in Nineveh, Achaemenid cuneiform documents, and ancient papyri further prove that translation activities possessed an institutional character within the civilizations of the Near East (Səmədova, 2024, p. 200).

One of the most remarkable examples in the history of translation is the translation of the Epic of Gilgamesh from Sumerian into Akkadian, which demonstrates the importance of translation in preserving and circulating cultural heritage (Nəzərova, 2021, p. 262). Similarly, the translation of Homer's Odyssey into Latin was regarded not merely as the transfer of a text into another language, but as a historical turning point through which ancient Greek thought was transmitted into Roman culture (Nağıyeva, 2009, p. 9). Thus, from its earliest stages, translation developed not simply as a process of word transfer, but as a means of transmitting cultural experiences and aesthetic values to new societies.

A significant portion of translations produced during Antiquity was based on the principle of word-for-word translation. This approach, which regarded the source text as an absolute authority, placed the translator in a largely passive position and relegated the reconstruction of meaning, aesthetic structure, and cultural context in the target language to the background (Kızıltan, 2000, pp. 74–75). Nevertheless, the approach introduced by Cicero liberated translators from absolute dependence on the source text and contributed to the development of a freer understanding that prioritized meaning, effect, and expressive power (Kızıltan, 2000, p. 77). During the Middle Ages, translation activities developed primarily around the transmission of religious texts. While Bible translations gained importance with the spread of Christianity throughout Europe, the great translation movement that began in

the Islamic world from the seventh century onward played a decisive role in the development of scientific and philosophical thought (Nəzərova, 2021, p. 263). Through translations from Greek, Syriac, and Persian conducted in centers such as the House of Wisdom (Bayt al-Hikma) in Baghdad, accumulated knowledge in science, medicine, astronomy, and philosophy was transferred into Islamic civilization and later carried to Europe through the Toledo School of Translators (Nəzərova, 2021, p. 264). In this way, translation functioned as an intellectual bridge between East and West and became the primary instrument of intercivilizational knowledge exchange.

During the Renaissance and Humanist periods, the understanding of translation gained a new direction. Admiration for ancient Greek and Roman culture transformed translation into one of the major instruments of cultural rebirth. Humanist translators sought to preserve not only the meaning of the source text, but also its aesthetic structure, word order, and expressive power (Kızıltan, 2000, p. 81). Martin Luther's translation of the Bible into German is considered the beginning of a new era in translation history. By prioritizing a natural language that ordinary people could understand, Luther emphasized the comprehensibility of the target text and thereby contributed to the development of modern translation thought (Geldi, 2025, p. 53). Under the influence of Enlightenment thought during the seventeenth and eighteenth centuries, translation came to be regarded not merely as text transfer, but as an intellectual activity in which meaning, cultural context, and the relationship established with the reader were consciously organized (Akalın, 2018, p. 1).

With the rise of the Romantic period, translation theory was reconsidered within the framework of culture, national identity, and literary originality. During this era, rather than completely adapting a foreign work to the target culture, it was argued that the originality and foreignness of the work should be preserved in translation (Yücel, 2016, pp. 101-102). Consequently, translation began to be perceived as a field of experience that confronts readers with the intellectual and aesthetic world of another culture. The growing importance of concepts such as untranslatability, foreignization, and cultural originality in modern translation theory is also closely connected with this historical process.

The Formation of the Translation Tradition in Azerbaijan and Translations of German Literature

The formation of the translation tradition in Azerbaijan is closely connected with the cultural sphere of the medieval East. From the fourteenth century onward, the intensive cultural interaction among Arabic, Persian, and Turkish literary traditions made a significant contribution to the development of translation activities in Azerbaijan (Əsgərli, 2009, p. 9). In the early stages, the translation of religious texts, commentaries, and hadith books occupied a central position; however, over time, classical works of Eastern literature such as Ferdowsi's *Shahnameh*, Saadi's *Gulistan*, and the works of Nizami were also translated into Azerbaijani Turkish (Səmədova, 2024, p. 200).

Both literal and free translation approaches can be observed in the medieval Azerbaijani translation tradition. As Academician Möhsün Nağısoylu notes, literal translation is based on transferring word equivalents directly, whereas free translation aims to reconstruct meaning within the natural structure of the target language (Nağısoylu, 2000, p. 19). The fact that Eastern translators attached greater importance to free translation demonstrates that they perceived translation not as a mechanical transfer but as a process of creative reproduction. This approach can clearly be observed in Fuzûlî's masterful translation of Jami's *Chehel Hadith* into Azerbaijani Turkish (Səmədova, 2024, p. 202).

During the Safavid period, the Azerbaijani translation tradition entered a new stage of development. The translation of works such as *Şühedanâme* and *Sheikh Safi Tezkiresi* into the native language contributed to the development of prose literature, while in the nineteenth century, contacts established with Russian and European literature enabled the Azerbaijani translation school to engage more intensively with Western culture (Səmədova, 2024, p. 203). Thus, translation became one of the principal instruments for the dissemination of modern literary genres, new aesthetic perspectives, and contemporary systems of thought in Azerbaijan.

The translation of Azerbaijani literature into European languages has also been of great importance in terms of intercultural relations. In particular, the translation of classical authors such as Nizami Ganjavi, Nesimi, Fuzûlî, and Hâkanî into European languages contributed to the recognition of Azerbaijani literary thought within world literature. However, Azerbaijani–German literary relations occupy a special place within this process. The fact that the first translations from German into Azerbaijani Turkish began with the activities of M. Topçubaşov is regarded as one of the important stages in the introduction of German literature into the Azerbaijani cultural environment (Əlimirzəyeva-Mustafayeva, 1999, p. 15). In later periods, the works of German writers such as Goethe, Schiller, Heine, Anna Seghers, and Bertolt Brecht were translated into Azerbaijani Turkish, enabling Azerbaijani readers to become acquainted with German thought, Romanticism, and the humanistic worldview.

Johann Wolfgang von Goethe's *Faust* and *The Sorrows of Young Werther*, Friedrich Schiller's *The Robbers* and *The Maid of Orleans*, as well as Heinrich Heine's poetry, are among the significant examples of the Azerbaijani translation school. The translation of these works into Azerbaijani Turkish not only introduced German literature, but also contributed to enriching Azerbaijani national literary thought with new themes and aesthetic possibilities. Concepts such as German Romanticism, the idea of freedom, the individual's inner conflict, and social criticism created new layers of meaning within the Azerbaijani literary environment. Although translation activities during the Soviet period were carried out under ideological control, interest in German literature developed in a freer and more multidimensional manner after independence. In particular, the publication of world literary classics in Azerbaijani Turkish in accordance with the decree issued by Ilham Aliyev on August 24, 2007 enabled important representatives of German literature to reach broader audiences. The translation of the works of writers such as Johann Wolfgang von Goethe, Hermann Hesse, Stefan Zweig, Franz Kafka, Heinrich Böll, and Erich Maria Remarque into Azerbaijani Turkish represented not only a literary event, but also an important indicator of Azerbaijan's integration into world culture.

Through these translations, Azerbaijani readers gained the opportunity to become more closely acquainted with the history, culture, intellectual world, and aesthetic values of the German people, while the Azerbaijani translation school itself became linguistically and artistically enriched. Thus, translations from Azerbaijani into German and from German into Azerbaijani Turkish contributed to strengthening cultural dialogue between the two peoples, increasing mutual literary interaction, and establishing a broader sphere of shared understanding within world literature.

Word Choice, Equivalence, and Stylistic Problems in Literary Translation

Literary translation is not merely the process of transferring meaning from one language into another, but also the reconstruction of a culture's aesthetic world, mode of thought, emotional atmosphere, and artistic system of expression. For this reason, unlike other types of translation, literary translation aims not only to convey informative content but also to recreate the aesthetic effect, stylistic features, and emotional tone of the source text within the target language. From the perspective of translation theory, it becomes evident that translation must preserve not only meaning, but also form, rhythm, harmony, and expressive power. Indeed, as early as the Renaissance period, Dante emphasized that the greatest difficulty in translating poetry lies in the impossibility of transferring the harmony and musicality established in poetry completely into another language (Vəliyeva and Hacıyeva, 2022, p. 6). This view reveals the inevitability of aesthetic loss, recreation, and interpretative approaches, particularly in literary translation.

The concepts of fidelity, adequacy, and equivalence, which constitute the foundation of literary translation, demonstrate that translation is not a mechanical operation based solely on dictionary correspondences. A.V. Fyodorov defines translation as the reproduction of content expressed through the means of one language into another language while preserving semantic integrity and the principle of fidelity (Vəliyeva and Hacıyeva, 2022, p. 9). Similarly, Qak emphasizes that the

task of translation is not only to transfer thoughts expressed in the source language, but also to reconstruct the formal and stylistic characteristics of the text through the possibilities of the target language. According to him, the fundamental element distinguishing translation from other forms of transfer is the preservation of the relationship between content and form. This approach becomes especially prominent in literary texts, because a literary work reflects not only an individual expression but also the cultural memory, aesthetic understanding, and linguistic worldview of a particular society (Əliquliyeva, 2026, p. 164).

In this context, literary translation should be regarded as a creative process of reproduction that aims to create a similar aesthetic and emotional effect on the reader beyond merely transferring meaning. Eugene Nida's concept of "dynamic equivalence" also supports this idea. According to Nida, a successful translation is measured not only by conveying the information contained in the source text, but also by recreating in the target reader an effect similar to that experienced by the source reader (Nida, 1964, p. 120). The types of equivalence proposed by Werner Koller (denotative, connotative, pragmatic, and formal-aesthetic equivalence) likewise demonstrate that literary translation must take into account not only meaning, but also form, aesthetic structure, connotations, and reader response (Koller, 1992, pp. 215–216). Therefore, literary translation is a multilayered act of reconstruction that requires the translator to make creative decisions on linguistic, cultural, and aesthetic levels.

At the center of this creative process lies word choice. In literary texts, words are not merely units that carry meaning; they are also artistic instruments that create rhythm, atmosphere, character, emotion, and aesthetic connotation. Meyer regarded word choice not simply as a stylistic issue, but as the fundamental factor determining the expressive power of literary language (Meyer, 1906, p. 23). According to him, the correct word must convey not only the basic meaning of a thought, but also its emotional, cultural, and stylistic value. Therefore, word choice is not merely the act of finding dictionary equivalents, but the process of expressing thought in the most aesthetically and communicatively appropriate form.

Sowinski also identifies appropriateness, clarity, and concreteness as the fundamental principles of correct word choice. According to him, finding the right word often means solving the central problem of expression, because words not only convey information but also determine the emotional and aesthetic impact of a text (Sowinski, 1999, p. 201). Similarly, Riesel argues that ambiguity in word choice leads to the fragmentation of thought and weakens expressive power (Riesel, 1963, p. 42). Golub likewise emphasizes that every word carries a particular semantic and logical burden, and that an incorrectly chosen word may damage the entire aesthetic structure of a text. Therefore, in literary translation, word choice plays a decisive role not only in terms of linguistic accuracy, but also with regard to logical coherence, aesthetic harmony, and communicative effect.

Demirçizade's views on word choice are of particular importance for literary translation. Dəmirçizadə evaluates word choice not merely as a problem of lexical equivalence, but as a fundamental stylistic element in the construction of literary imagery and the preservation of a text's aesthetic effect. According to him, translators should consciously make use of synonymous or near-synonymous words, figurative expression, sound harmony, and phonetic associations. Not only the conceptual meaning of a word, but also its sound structure, syllabic arrangement, rhythm, and emotional tone are significant in translation (Dəmirçizadə, 1962, pp. 32–33). This approach demonstrates that word choice occupies a central place in the process of aesthetic creation in literary translation.

In literary translations from Azerbaijani into German, word choice becomes even more complex. Azerbaijani Turkish and German not only belong to different language families, but also represent different cultural modes of thought, aesthetic traditions, and systems of expression. Azerbaijani Turkish is characterized by figurative expression, emotional intensity, rhythmic structure, and a vivid style rooted in folk speech, whereas German stands out as a more systematic language with strong structural and syntactic density. Therefore, in translations from Azerbaijani into German, the translator's

primary task is not merely to transfer meaning, but also to reconstruct the emotional and aesthetic atmosphere specific to Azerbaijani literary language within the expressive possibilities of German.

This issue becomes especially evident in the translation of figurative expressions, idioms, dialectal features, and cultural connotations. In Azerbaijani Turkish, a word often carries not only an objective meaning, but also reflects social belonging, emotional tone, cultural memory, and character traits. In order to preserve this multilayered semantic structure in German translations, translators must develop context-appropriate equivalence strategies. At this point, direct equivalents are not always sufficient; in some cases, synonymous, periphrastic, or occasional equivalences may need to be employed (Əliquliyeva, 2026, pp. 170–171). Particularly in transferring vocabulary specific to Azerbaijani culture into German, explanatory and contextual solutions gain importance.

The decisive role of word choice in literary translation can clearly be observed in Qurbanlı's Azerbaijani Turkish translation of Erich Maria Remarque's novel Lisbon Night. Remarque's psychologically dense language, built upon inner monologue and existential loneliness, is recreated in translation not only on the semantic level but also on emotional and aesthetic levels. For example, the German expression "wie erlöst" translated as "sanki, ayılmışam" does not merely convey the meaning of "as if relieved," but also expresses the character's inner transformation in a more natural and effective way in Azerbaijani Turkish. Similarly, the sentence "Die Schwere und Verlegenheit wich" rendered as "Ürək ağrıları da, pərtlik də çəkilib getdi" reproduces not the mechanical equivalent of the word "burden," but rather the character's psychological distress and emotional weight more powerfully in the target language. Here, the translator attempts to achieve emotional and expressive adequacy beyond semantic equivalence.

A similar situation can also be observed in the comparison of different Azerbaijani Turkish translations of Johann Wolfgang von Goethe's The Sorrows of Young Werther. In contrast to S. Şamilov's more word-bound approach, Qurbanlı's translation demonstrates a more natural, poetic, and fluent style. For instance, translating the expression "das liebe Tal" as "dörd yanımdakı gözəl vadi" preserves not only the semantic meaning, but also the romantic atmosphere of nature, emotional warmth, and poetic tone. Expressions such as "Keçilməz qaranlıq," "küllü-rəhmanın həniri," and "ayrı-ayrı saçaqlar oğurlanıb daxili müqəddəsliyə baş vuranda" recreate Goethe's romantic spirit through the aesthetic and rhythmic possibilities of Azerbaijani Turkish.

Similar problems also arise in translations from Azerbaijani into German. The emotional intensity, poetic quality, and metaphorical expression rooted in Azerbaijani folk culture do not always find direct equivalents in German. Therefore, translators are sometimes required to expand meaning and at other times to prioritize aesthetic effect in order to produce new solutions. Particularly when translating Azerbaijani poetry into German, sound repetitions, alliterations, diminutive suffixes, and emotional connotations are largely restructured. This is because the rhythmic and syntactic structure of German differs significantly from the melodic flow of Azerbaijani Turkish. Consequently, translators attempt to preserve the aesthetic effect while also creating a natural and readable text in the target language by taking into account the structural differences between the two languages.

Problems of Synonymy, Antonymy, Homonymy, and Polysemy in Literary Translations from German into Azerbaijani Turkish

In literary texts, words are not merely linguistic units that convey information; they are also fundamental elements that construct characters, create atmosphere, determine the rhythm of narration, evoke emotions in readers, and sustain the artistic integrity of the text. In this respect, word choice in literary translations from German into Azerbaijani Turkish reveals not only the translator's linguistic competence, but also their aesthetic sensitivity, cultural knowledge, and interpretative ability.

One of the most evident manifestations of word choice problems emerges in the field of synonymy. In linguistics, synonymy is defined as the existence of semantic proximity or similarity between two or more linguistic units. Nick Riemer explains synonymy as semantic sameness between two

words (Riemer, 2010, p. 150), whereas Hadumod Bussmann evaluates this concept as a semantic relationship establishing strong similarity of meaning between two or more linguistic expressions (Bussmann, 1998, p. 1165). John Lyons likewise states that expressions carrying the same meaning may be regarded as synonymous (Lyons, 1995, p. 60). Nevertheless, absolute synonymy is highly limited in natural languages. According to Stephen Ullmann, one word can replace another in every context without producing any cognitive or emotional difference only in cases of absolute synonymy, and such examples are extremely rare in natural languages (Ullmann, 1959, pp. 108–109). Therefore, in literary translation, synonymy should be approached not merely as semantic sameness, but as a relative semantic proximity dependent on context, usage environment, stylistic level, and aesthetic function.

German possesses a broad synonymic system capable of expressing the same concept with different psychological, social, and stylistic tones. For example, the verbs "sehen," "blicken," "schauen," "starren," and "glotzen" all generally belong to the semantic field of "looking," yet each carries a different nuance of meaning. "Blicken" refers to a more conscious and attentive look, "schauen" to observation, "starren" to a prolonged and fixed stare, while "glotzen" expresses a rude or disturbing gaze. Rendering all of these words into Azerbaijani Turkish solely with the verb "baxmaq" may weaken the psychological detail and subtlety of character behavior present in the source text. Therefore, depending on the context, translators should select different equivalents such as "göz gəzdirmək," "zillənmək," "dik baxmaq," or "mat-mat baxmaq." Similarly, words such as "Angst," "Furcht," "Sorge," "Kummer," "Leid," and "Verzweiflung" all belong to the semantic field of fear, anxiety, and suffering, yet they do not express the same emotional state. "Angst" conveys a more internal and existential fear, "Furcht" fear in the face of a concrete threat, "Sorge" anxiety, "Kummer" inner distress, "Leid" suffering, and "Verzweiflung" profound despair. Rendering all of these into Azerbaijani Turkish merely as "qorxu," "narahatlıq," or "kədər" may narrow the psychological layers of the text. For this reason, more functional equivalents such as "tələş," "vahimə," "daxili sıxıntı," "əzab," and "ümidsizlik" should be preferred according to context.

The problem of synonymy is not limited solely to the transfer of meaning; it is also decisive in terms of stylistic transfer. In German, the verbs "essen," "speisen," and "fressen" all express the act of eating, yet they do not belong to the same stylistic level. While "speisen" carries a more formal and refined tone, "fressen" has a rude and derogatory connotation. Translating all of these words into Azerbaijani Turkish simply as "yemək" in every context may eliminate the character's social position, the narrator's attitude, and the stylistic level of the text. Depending on the context, alternatives such as "qidalanmaq," "yemək yemək," "boğazlamaq," or "tıxışdırmaq" may be considered. This demonstrates that word choice possesses not only semantic, but also social, stylistic, and aesthetic functions. As E.G. Riesel points out, correct word choice plays a decisive role in conveying thought clearly, completely, and effectively; synonyms constitute one of the fundamental tools that allow translators to reconstruct thought in accordance with context, style, and communicative purpose (Riesel, 1963, p. 42).

Another important dimension of word choice problems is the transfer of antonyms. Antonymy is one of the fundamental categories of the lexical-semantic system of language and is closely connected with the human tendency to perceive reality through oppositions. Words name not only objects and events, but also abstract concepts formed within the human mind; the existence of oppositional qualities in nature and social life provides the basis for expressing these oppositions through words in language (Xəlilova, 2021, p. 10). John Lyons classifies oppositional relations into three main groups: antonymy, complementarity, and converseness. According to him, the opposition found in antonyms arises not merely because words exclude one another, but because they semantically condition one another (Xəlilova, 2021, pp. 10–12). This approach demonstrates that antonyms are not simply words with opposite meanings, but important elements that create semantic tension, dramatic structure, and intellectual contrast within a text.

In German literary texts, oppositions such as "Licht-Dunkelheit," "Leben-Tod," "Freiheit-Gefangenschaft," and "Stille-Lärm" often function not only at the lexical level, but also at symbolic and philosophical levels. The opposition between "Licht" and "Dunkelheit" may include not only the physical relationship between light and darkness, but also abstract semantic layers such as hope-despair, knowledge-ignorance, and life-death. Therefore, rendering this opposition simply as "işıq-qaranlıq" in every context may not always be sufficient; depending on the aesthetic and symbolic structure of the text, equivalents such as "nur-zülmət," "aydınlıq–qaranlıq," or "ümid-ümidsizlik" may be preferred. Similarly, the opposition "warm-kalt" may signify not only physical warmth and coldness, but also intimacy and distance in human relations. The expression "Ein warmer Empfang" should, depending on context, be translated not as "isti qarşılama," but rather as "səmimi qarşılama," while "kalter Empfang" may convey not merely "soyuq qarşılama," but in some cases "laqeyd münasibət" or "rəsmi və məsafəli qarşılama."

Context plays a decisive role in the translation of antonyms. The German word "leicht" may, depending on context, mean "light," "easy," "insignificant," or "comfortable"; therefore, its opposite also changes according to context. In the semantic field of physical weight, the word "schwer" establishes opposition with the meaning "heavy," whereas in the context of tasks or problems it means "difficult." For this reason, translating the phrase "eine leichte Aufgabe" as "hafif görev" would be incorrect; the appropriate equivalent here should be "asan tapşırıq." This example demonstrates that word choice should be based not on dictionary equivalence, but on the functional semantic relationship within the text. Likewise, while the opposition "gut-schlecht" can generally be translated as "yaxşı-pis," more literary and aristocratic oppositions such as "edel-gemein" require more functional equivalents such as "nəcib-rəzil" or "alicənab-alçaq."

Homonyms also create significant word choice problems in literary translations from German into Azerbaijani Turkish. The term "homonym" derives from the Greek words "homos" and "onoma," meaning "same name." In linguistics, homonyms are defined as words that are identical in spelling or pronunciation but carry different meanings (Hüseyxanova, 2020, p. 29). Although homonyms appear similar to polysemous words, there is a fundamental distinction between them: in polysemous words, the different meanings share a common conceptual connection, whereas in homonyms, words with the same phonetic structure have no direct semantic relation, or such a relation has disappeared over historical development. For this reason, homonyms may create serious semantic ambiguities during the translation process.

In German, the word "Bank" may mean both "bank" and "bench." The sentence "Er sitzt auf der Bank" should be translated as "O, skamyada oturur"; however, if the economic institution meaning is taken into consideration, the target text would produce a meaningless expression. Similarly, the word "Schloss" can mean both "castle/palace" and "lock." Depending on the context, the sentence "Das Schloss ist alt" may be translated either as "Qəsr qədimdir" or "Kilid köhnədir." Such examples demonstrate that, in the translation of homonyms, not only the sentence-level meaning but also the overall context of the text must be taken into account. In literary texts, homonyms are sometimes deliberately employed to create irony, wordplay, symbolic depth, or polysemy. In Johann Wolfgang von Goethe's work, the word "Partie" may, depending on context, mean "group," "game," "side," or "entertainment"; the translator's rendering of this expression as "dəstəyə qoşulmaq" represents a contextual choice that foregrounds the meaning of social togetherness (Goethe, 1958, p. 29; Qöte, 2010, p. 638).

One of the areas that requires the greatest attention in word choice is polysemy. Polysemy refers to the situation in which a word acquires different meanings according to context. Werner Koller states that polysemy creates serious problems during the translation process on lexical, grammatical, and syntactic levels (Koller, 2011, p. 139). Particularly in literary texts, the meanings of words are shaped not only by their basic conceptual values, but also by their connotative and aesthetic functions. Therefore, the translator must accurately determine which semantic aspect of a

polysemous word is active within the text. According to Bayramov, polysemy is resolved through context and situation during the translation process; the fact that a linguistic sign may possess multiple referents forces the translator to consider the text as a whole (Bayramov, 2008, p. 50). Abdullayev likewise evaluates phenomena such as polysemy, homonymy, synonymy, and idiomaticity as complex characteristics inherent in the natural structure of language (Abdullayev, 2013, p. 56). Dəmirçizadə also states that words are often not monosemous, but acquire new semantic layers in different contexts (Dəmirçizadə, 1962, p. 152).

The problem of polysemy can clearly be observed through the German word "grau." In its basic sense, "grau" denotes the color "gray"; however, depending on context, it may also evoke connotations of gloom, uncertainty, paleness, hopelessness, or psychological distress. In Erich Maria Remarque's work, the sentence "Es war grauer Morgen draußen" translated into Azerbaijani Turkish as "Bayırda tutqun bir səhər açılırdı" [Remarque, 1976, p. 16; Remark, 2009, p. 25] demonstrates that the word is conveyed not only through its color meaning, but also together with the atmosphere it creates. Likewise, the sentence "Das Mädchen lag grau in den Kissen" translated as "Qızın solğun bənizi yastıqdan güclə seçilirdi" (Remarque, 1976, p. 38; Remark, 2009, p. 50) shows that the word "grau" is associated not with physical color, but with a sense of illness, paleness, and weakness. Similarly, the expression "grauhaarige Herrschaftsdiener" in Stefan Zweig's work translated as "çalbaş kamerdiner" (Zweig, 1986, p. 155; Svayq, 2010, p. 314) demonstrates that not only the color of the hair, but also the connotations of old age and experience are preserved in the target language.

Based on these examples, it can be argued that the problem of word choice in literary translation should be evaluated not merely on the lexical level, but within the entire aesthetic structure of the text. A translator cannot be satisfied with knowing only the dictionary equivalent of a word in the source language; they must also analyze the relationship of that word with character psychology, the narrator's attitude, the rhythm of the text, its cultural connotations, and the effect it will create on the reader. Eugen Riesel's classification of the stylistic function of word choice under three categories-"the precise, accurate, and concrete expression of ideological content," "the expression of the speaker's ideological-political position," and "the expression of the speaker's individual-subjective attitude" (Riesel, 1954, p. 41) – demonstrates that word choice is not merely a matter of transferring meaning, but also a question of intellectual and aesthetic positioning. Likewise, the emphasis by Riesel and Şendels that vitality, concreteness, imagery, and emotional intensity in literary language are constructed through different layers of vocabulary is highly significant in this respect (Riesel, 1975, p. 29).

Conclusion. The problem of word choice in literary translations from German into Azerbaijani Turkish is not merely a matter of linguistic equivalence; it is also a multilayered translation issue directly connected with cultural transfer, aesthetic reproduction, and the preservation of style. The findings of this study demonstrate that success in literary translation does not depend solely on transferring the dictionary meanings of words, but also requires the reconstruction of the emotional atmosphere, cultural connotations, rhythmic structure, and aesthetic effect of the source text within the target language. This situation becomes particularly evident in translations between languages belonging to different language families, such as German and Azerbaijani Turkish.

Within the scope of the study, it has been observed that synonyms, antonyms, homonyms, and polysemous words create significant semantic and stylistic problems during the translation process. The fact that many German words carry different psychological, cultural, and aesthetic layers of meaning depending on context makes it insufficient for translators to rely solely on direct equivalents. Therefore, contextual equivalence, functional adequacy, and cultural interpretation emerge as fundamental elements of the literary translation process. The examples drawn from the works of Johann Wolfgang von Goethe, Erich Maria Remarque, and Stefan Zweig demonstrate that successful translations are only possible through creative translation strategies capable of reconstructing the aesthetic spirit and expressive power of the text in the target language.

The research has also revealed that translations of German literature into Azerbaijani Turkish perform an important function not only in literary terms, but also in terms of cultural and intellectual interaction. The transfer of German literature into the Azerbaijani cultural environment has contributed to the development of cultural dialogue between the two peoples and has helped enrich the Azerbaijani translation school linguistically and aesthetically. In this context, literary translation functions as an intercultural bridge that creates a shared aesthetic and intellectual space among different societies.

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DOI https://doi.org/10.30525/2592-8813-2026-2-61

THE REALITIES OF "LORD OF THE FLIES"

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Abstract. The uniqueness of William Golding's work lies in the solidity and depth of its structure and organization. The writer carefully constructed his works, enriching them with "meaning" through the use of classical literature, symbolism, and mythology. Along with being a creator of myths, Golding is also recognized as an author whose works illuminate truths about human nature. At times, he reveals literary precedents by presenting them in new ways, while at other times he introduces specific details derived from his own experiences and interests. In an interview with the BBC, Golding himself admitted: "If someone replaced the word myth with the word fable, I would actually accept it as a compliment." According to Golding, allegory is discovered in an environment where myth evolves from former belief into present creation, departing from its original version and transforming itself. It is a form that contains life and experience. Written in 1954 by William Golding, the novel Lord of the Flies remains highly significant today because of the underlying meanings embedded in its subject matter. The work is considered one of the most famous novels about human nature. "Lord of the Flies" is surrounded by myths and contains numerous references to mythological motifs. Besides being exciting and entertaining, the novel carries a profound philosophical meaning concerning human nature, power, fear, and the fragility of civilization. The work also contains plot motifs directly borrowed from myths. "Lord of the Flies" is regarded as one of the greatest modern English novels because of its timeless and socially relevant themes.

Key words: Myth, writer, literary work, society, civilization.

Introduction. Mythology is the beginning of science. Unfortunately, within today's positivist understanding, mythology has not been placed at the foundation of the history of science. Mythology emerged as a product of humanity's first curiosity and desire to understand its surroundings. Myth has existed in all societies. Indeed, it appears to be an essential component of human culture. Since myths possess numerous varieties, it is difficult to generalize about their nature. Nevertheless, it is clear that through both the common features and details of myths, peoples reflect, express, and over time explore human character. The study of myth is of great importance both for the study of individual societies and for the understanding of human culture as a whole. The use of myths in modernist literature emphasizes the classical tone of the era. Myth possesses a symbolic value; it condenses emotions and experiences. It may also be argued that mythology paved the way for modern literary works, or counter-mythologies, to be accepted as significant works of world literature.

One of the writers recognized as a creator of myths is William Golding. William Golding is known as an allegorical novelist, fabulist, imaginative anthropologist, and myth-maker. The fabulist nature of the writer becomes evident throughout his works. A close examination of his literary creations reveals his deep interest in the moral chaos and traditions of his era. When his beliefs are considered, it becomes clear that he was neither a Puritan nor a transcendentalist. The writer's understanding of religion was based on the interpretation of his own life experience.

It is therefore no coincidence that, while explaining the events of the human world, Golding turned to myths. Likewise, many writers and philosophers before him also used mythical narratives to interpret various human conditions. In general, Golding examines moral difficulties by exploring the characteristics of human existence in his writings, and he portrays his characters in the most intense situations in order to explain their lives within a "mythological" dimension. Thus, according to Golding,

myth is not a relic of the past, but an inseparable part of our present life and modern age – an image and action through which truth is revealed.

Discussion. In the novel, two opposing forces within human beings, civilization and savagery, confront one another. The writer contrasts civilization with primitiveness. Through this opposition, Golding demonstrates that both civilized and savage aspects exist within every individual. At the beginning of the work, a group of boys, the oldest being twelve years old, survive a plane crash and find themselves on a tropical island. The children believe that adults will certainly come to search for and rescue them from their situation. Initially abandoned and left alone, the schoolboys realize the importance of choosing a leader, forming unity, establishing order, and obeying the rules set by their chosen leader.

The island on which they land resembles a paradise; everything necessary for survival is available there. At first, the boys think they will live comfortably until adults arrive to rescue them. The island appears to offer an opportunity to establish an orderly society. However, this "orderly society" begins to oppress the boys, and they gradually surrender to their instincts. In the novel, Golding shows that what protects human beings from savagery is the existence of social rules. In order to preserve these rules and organize life on the island, the boys choose the oldest among them, Ralph, as their leader. Yet another boy on the island, Jack, refuses to accept this decision because he considers himself more worthy of leadership. The main conflicts of the novel begin precisely from this point.

In the work, Ralph represents discipline, order, and democracy, whereas Jack symbolizes power, violence, and dictatorship. While Ralph is intelligent, brave, strong, and kind-hearted, Jack stands in complete opposition to these qualities. By depicting the boys' ultimate defeat and destruction on the island, the writer conveys to the reader the message that all human beings bear guilt within themselves. Through this, Golding suggests that if society lacks order and law, people can very easily become savage.

It is clear that the novel is not merely a simple adventure story about boys stranded on an island. Golding combines twentieth-century methods of analyzing people and society and creates a theoretical situation through which these ideas can be tested. Through his novel Lord of the Flies, William Golding proved that mythological texts, as one of the most important cultural phenomena and primitive worldviews in human history, exert a decisive influence on all subsequent socio-cultural developments. As Abbasli notes, "Golding demonstrates that education not strengthened by moral upbringing is incapable of preventing savagery" (Abbasli, 2010, p. 9).

Furthermore, in the twentieth century, William Golding, through the use of myth in his novel Lord of the Flies, presents the boys on the island as a microcosm of the real world. Through this microcosm, Golding conveys the idea that human beings are inherently evil and capable of destroying society. By analyzing various events taking place in today's world, the reader comes to understand the impact that a collective mentality can have on society. Through this novel, William Golding teaches us that the greatest horror does not come from evil originating in an external enemy, but from the evil that exists within each of us. The writer seeks to demonstrate that there is a devil hidden within every person, and that the power of evil desires prevents individuals from controlling their own greed and selfish impulses. Jack's obsession with power gradually strips him of his humanity and transforms him into a devil-like figure. The novel also reveals how power can fundamentally change a person. In general, "…he convinces the reader that the fate of the present depends on the past" (Huseynova, 2018, p. 171).

Myth and mythological elements have been extensively studied by world literary scholars and theorists. If we pay attention, we can see that twentieth-century writers and theorists proposed their own interpretations of myths and produced works in this direction. In this regard, the German theorist Alfred Rosenberg's work The Myth of the Twentieth Century may be cited as an example. Likewise, among such writers we may also include William Golding and his unique literary creativity.

Golding's works, especially "Lord of the Flies," have been translated into many languages around the world. It is precisely in this novel that William Golding explores the idea that "man is a fallen creature." In Azerbaijan, Golding's творчество and works were studied and translated by Ramiz Abbasli. In his book *Selected Works of William Golding*, Ramiz Abbasli provided information about the writer's life and творчество, translated his works, and included them in the collection.

Purpose of the Research. The purpose of this research is to clarify the principles of mythological plot motifs in the artistic structure of William Golding's novel "Lord of the Flies" and to determine the significance of myths in the works of the English prose writer. The study also aims to theoretically analyze mythological elements, demonstrate the methods of using myth in Golding's creativity, and conduct a mythological analysis of the novel "Lord of the Flies." The research is based on preliminary information about William Golding's personality, literary activity, and mythology, as well as on scholarly and theoretical studies concerning mythological elements in the writer's works. Since the purpose of the study is to clarify the principles of mythological plot motifs in the artistic structure of Lord of the Flies and to determine the significance of myths in the works of the English prose writer William Golding, the research first examines the initial theoretical approaches to mythology. As noted, "depicting the characteristic features of the era and time, as well as many important aspects arising in human psychology and inner spiritual experiences during this process, becomes the principal artistic purpose and intention" (Huseynova, 2024, p. 46). The life and literary creativity of the twentieth-century English writer, especially the mythological elements in his works, have been studied in detail. At the same time, this research has provided preliminary insights into the novel "Lord of the Flies," which constitutes the subject of the present study, and has led to an examination of the mythological elements within the work.

Mythology is the starting point of human culture. At present, it is impossible to understand anything beyond it, and perhaps this may never be possible. In general, the path toward human self-awareness passes through mythology. Without mythology, it is impossible to penetrate the ethnocosmic essence of any culture. As M. Ocal Oguz writes, "it is impossible for a culture to exist without mythology." Mythology is the starting point of humanity's need to learn. It represents the oldest knowledge that has survived to the present day through humanity's passion for understanding. Mythology is the beginning of science. Unfortunately, within today's positivist worldview, mythology has not been placed at the foundation of the history of science. Mythology emerged as a product of humankind's first curiosity and desire to understand its surroundings.

The irreplaceable English dramatist and novelist of the first and second halves of the twentieth century, William Golding, presents himself as a person of an entirely new era, whose perception was shaped by an understanding of the events of the two World Wars. Golding's works reflect a profound concern for humanity. Since he portrays the complex world of modern people, there is no expression of perfect freedom in Golding's literary universe. His characters submit to suffering without understanding its causes, and sometimes their entire lives pass in unbearable torment. Even when they understand the reason for their suffering, they often fail to find a way out. Golding's obsession with the dark aspects of human nature is not merely a literary claim. During his lifetime he was an extremely private individual, yet after his death his biography and personal documents became material for interpreting a man who struggled with his own dark thoughts and whose writings continue to serve as subjects of scholarly research. As Huseynzade notes, "one may conclude from the work that all deficiencies and ugliness are bestowed upon humans from birth, and if a human becomes savage, he may become worse than a predator" (Huseynzade, 2017, p. 30).

The uniqueness of William Golding's work lies in the strength and depth of its organization. He carefully constructed his works and enriched them with "meaning" through the use of classical literature, Christian symbolism, and mythology. At the same time, the writer, as a creator of myths, composes stories that illuminate truths about human nature.

It is therefore no coincidence that, while explaining the events of the human world, Golding turned to myths. Likewise, writers and philosophers before him also used mythical narratives to interpret various human situations. Thus, by examining the characteristics of human existence in his writings, Golding explores moral difficulties and portrays his characters in the most intense situations in order to explain their lives within a "mythological" dimension. According to Golding, myth is not a phenomenon of the past, but an inseparable part of our present life. It is the image and action through which truth reveals itself.

Thus, in his works William Golding portrays the complex world of modern human beings and, as a result, the writer is unable to find a perfect path to salvation within his own literary universe. These people suffer without fully understanding the reasons for their pain, and sometimes their entire lives continue in this manner. In reality, even when they do understand the source of their suffering, they are not always capable of finding a way out of their situation.

It is no coincidence that in the novel Lord of the Flies, Ralph, who symbolizes reason and common sense, despite being mistreated by his companions, resembles Prometheus in his attempt to guide his "savage" friends toward the right path while confronting the existence of a terrifying reality. No matter what happens, Jack constantly seeks different ways to discredit Ralph in the eyes of the other boys, who consider Ralph superior to him. The savagery within Jack gradually rises to the surface. Jack sets himself the goal of seizing power by portraying Ralph as a coward and a liar. Aspiring to leadership, Jack is skilled in hunting, and through this ability he provides the boys with meat. Since their nourishment depends on him, the children slowly begin to side with Jack. His arbitrariness becomes uncontrollable. Those who refuse to obey his commands are tied up and beaten, and the suffering inflicted upon them becomes endless. Jack transforms into a beast.

The beast itself symbolizes fear, and it becomes clear throughout the novel that the monster feared by the children is in fact the darkness within themselves. The beast exists inside every child. None of the boys around him understand this except Simon. Among all the children, Simon alone senses, feels, and comprehends this truth. Simon is wiser than the others; he understands and perceives reality more quickly than they do. Precisely because of this intelligence, he begins to think that perhaps the beast is actually the boys themselves.

Even at the very beginning of the novel, through the conversation between the fair-haired boy Ralph and the fat boy Piggy, the writer attempts to reveal the inner nature of these characters to the reader. While the two boys are walking together, Piggy proudly tells Ralph that he suffers from asthma, that he is the only one at school with this condition, and that he has worn glasses since the age of three because he struggles to breathe. In fact, the writer presents the glasses in the novel as a symbol of intelligence and science. The glasses represent humanity's dominance over nature within the work.

The works of William Golding compel readers to "see the truth." The characters he creates are rarely portrayed merely as victims of social or economic forces beyond their control. Rather, they are representations of human nature itself more than of individual personalities. The world they inhabit is tragic – a world in which human beings must both suffer and endure; a world in which they are forced to make choices, often choosing wrongly, and in almost every case leading toward the destruction of human life.

Finally, in the face of the manifestation of a human heart filled with so much hatred, the myth of the "Delphic Oracle" symbolizes the struggle between good and evil and expresses the moment of salvation by illustrating that these opposing forces always coexist together.

In the novel The Spire (1964), one of the central characters, Jocelin, experiences an intense inner struggle. As we continue reading the novel, we witness Jocelin arriving at new conclusions and gradually adopting a new way of thinking based on these realizations. The paradoxical tension between reason and faith is ultimately replaced by spiritual comprehension. Like his predecessors Ralph and Sammy, he pursues the goal of self-discovery. In the end, as a result of the struggle between the worlds of good and evil, he attains eternity in a state of spiritual peace and joy.

Thus, William Golding wrote Lord of the Flies after returning from the World War II, and his wartime experiences significantly influenced his perception of humanity. Golding came to believe that "man produces evil as a bee produces honey."

"Lord of the Flies" is not merely a simple adventure story about boys stranded on a tropical island. Golding enriched his narrative through the use of religious themes, emphasizing humanity's sinful nature and the constant need to establish a complete and harmonious connection with God. Throughout the novel, the characters, structure, themes, and references develop around the destruction of humanity, the problem of evil, and the consequences of sinful actions.

Golding emphasizes that the inner nature of human beings is hidden beneath the mask of civilization, yet this mask can easily be shattered. For many, humanity is imprisoned; for William Golding, however, humanity is diseased, and he expresses this conviction with certainty. Golding's "Lord of the Flies" is a fascinating and thought-provoking novel that descends into the depths of human nature and analyzes human psychology in conditions where social laws and order disappear.

At the beginning of the novel, the children's arrival on the island is itself the result of a military conflict. This symbolizes the way in which the chaos created by adults spreads even to innocent children. The author's greatest "blow" lies precisely in his choice of children as the main characters: "Children represent a simple and raw model of adult society." This serves as the clearest proof that the true mirror of any society is the behavior of its children.

In his Nobel Prize speech, William Golding emphasized the value of language and stated that the entire world remains connected through words and communication. As noted by Giyas (2018, p. 17): "A word presented with passion, together with mastery, enthusiasm, and talent, may sometimes become an extraordinarily magnificent means of salvation. Words possess the power to encourage people to speak to one another, because the word that escapes from the writer's mouth expresses not merely his own thoughts, but the ideas and reflections of the entire Earth. Words build bridges between human beings, between the traveler and his guide; thus nations are nourished by sound thought, equipped with wisdom, tyrants and merchants are defeated before their power, and nations find a common language with one another." In "Lord of the Flies," the writer likewise calls upon the reader, through the power of words, to move toward enlightenment and understanding.

With the words "All hostility melted before the flowers," William Golding presents nature in the novel almost as a silent witness. It is an eternal force that observes human savagery while always preserving its own sublime harmony. The calmness of the flowers, the silence of the forests, and the light of the fire demonstrate that nature stands against all contradictions and evil instincts within humanity with generosity and inexhaustible harmony. Nature neither interferes with human savagery nor punishes it; it simply continues its existence, because the supreme order of nature ultimately prevails over human evil. Golding depicts nature not merely as a background setting, but also as a mirror of human nature and as an eternal poem reflecting humanity's temporary struggles and conflicts.

Lord of the Flies is not simply a novel, but also a lesson about humanity itself. The greatest message conveyed by the work is the predatory potential hidden in the depths of human nature. The novel demonstrates that the rules and laws of civilization are in fact only a fragile covering that restrains humanity's primitive savage instincts. Once these rules disappear or weaken, the primitive impulses within human beings emerge openly.

Essentially, everything that occurs on the island in "Lord of the Flies" may be interpreted as a projection of modern humanity's spiritual quest, since "the darkness of the human heart" becomes the central theme of the characters' experiences.

As noted by Giyas (2018, p. 17): "We need more humanity, greater care, and purer love. Some people place all their hopes in political systems, believing that such systems can provide everything they desire; others assume that only love can create such a system. Personally, I believe that the truth lies somewhere in between. Even if we continue our path with foolish and irrational actions and stumble

along the way, the essential thing is to behave with dignity and goodness before humanity; otherwise, we will never fully understand the nature of the violence into which our planet is being dragged. For the human being is the crown of creation."

The novel "Lord of the Flies" is also regarded as a literary text that embodies the artistic paradigms of postmodernism. In terms of both form and content, it represents a parody of earlier literary works and serves as an example of a text shaped by the interaction between the aesthetic principles of realism and postmodernism, combined with the author's irony (Abdullayeva, 2019, p. 166).

Conclusion. Thus, it should be emphasized that in the novel "Lord of the Flies," the manifestations of evil both outside and within humanity are represented through several symbolic images: the Lord of the Flies itself, symbolizing the devil as the source of original sin; Jack and Roger, whose "hunter" images reflect biblical representations of the Antichrist; as well as figures resembling the servants of Satan described in the Book of Revelation. William Golding primarily demonstrates that all humanity possesses a sinful nature and that this nature easily reveals itself whenever social order and stability disappear. In Lord of the Flies, the young boys symbolize humanity, while the adult figure represents God. Without the guidance or assistance of adults, the boys destroy both the island and one another. Undoubtedly, although at the beginning of the novel they attempt to preserve a civilized and orderly way of life, within a short period they abandon these values and become the cause of catastrophe. Through this work, Golding seeks to show that human beings are sinful by nature, and once humanity loses its connection with God, it becomes spiritually lost and ultimately destroys itself. Although the boys struggle to establish order and remain good after the crash, almost all of them eventually surrender to their inner savage instincts. Ralph, Piggy, and Simon are the only characters who refuse to follow Jack – the embodiment of evil – and throughout the story they represent faith and positive human qualities.

Ultimately, the universality of Golding's message lies in the spontaneity of violence. Through "Lord of the Flies," the writer demonstrates that education must be strengthened by moral upbringing; otherwise, preventing savagery becomes difficult or even impossible. The novel narrates how a group of schoolboys stranded on a deserted island during the age of atomic warfare gradually abandon all the customs and traditions of the civilized world from which they came and reveal the terrifying truth underlying human nature. By the end of the novel, the boys' descent into savagery, their surrender to animalistic instincts, and their transformation into frightening human beings are vividly exposed by the author. This also serves as an indication of the extremes to which people may go in their struggle for power. As Abbasov states: "There is no essential reason for this other than the permanence of human desire and weakness. Even if we remove the influence of civilization and history, people will still create wars. Strip people of their education, culture, ideologies, political and religious loyalties, place them on a beautiful island free from enemies and ideologies, and they will still resort to violence in order to dominate one another, adopting the same desperation that motivates civilized societies on the island" (Abbasov, 2010, p. 289).

Through this work, the writer attempts to convey a message to the entire world: without the laws and culture established by society, human beings can easily become savage. Although children are traditionally regarded as pure and innocent beings, Golding's novel destroys the idea of childhood innocence and replaces it with primitive instincts. On one side stands Ralph, who values justice and seeks order and discipline in everything; on the other side stands Jack, who tramples upon all rules and is prepared to "shed blood" without hesitation for the sake of his own interests. These two characters serve as the clearest proof of the writer's ideas.

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DOI https://doi.org/10.30525/2592-8813-2026-2-62

HUMOROUS DISCOURSE IN ENGLISH AND ITS FUNCTIONS

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Abstract. The article opens the concept of humorous discourse based on the materials of the English language, determines the role of humor in pragmatic, linguistic and social discourses. It becomes clear that humor in English discourses is not only used to create laughter, but also acts as a discourse strategy that expresses social criticism, identity demonstration, ideological position and state relations. These strategies and goals of humor have found their bright reflection in the works of Oscar Wilde, Jonathan Sweet, Mark Twain and Jerome K. Jerome. In this regard, the article also examines the main functions of humorous discourse. The basis of these functions is to reflect the contrasts and contradictions of society with humor, demonstrate identity and social status through the English language, have an ironic, comic effect on the other party, create a status difference, create intimacy through jokes using puns (word play), metaphorical expressions, paradoxes, lexical transformations, criticize with irony, etc. The article gives an explanation of what each function will do and the role of these meanings in humorous discourse.

Key words: English literature, humor, discourse, social criticism, identity.

Introduction. Humor is a type of art related to human nature. Humor and laughter are embedded in the soul and blood of every nation as a hidden force. With humor and laughter, a person is spiritually refreshed, feels light, healthy and cheerful.

In the English people and in fiction, comicism appeared at a time when the inner emptiness and ugliness, which claimed reality and vital content, were covered with an external veil. In this literature, healthy humor and deep lyricism are very closely connected. However, the English do not only create laughter through humor. In fact, this goal is not pursued. Humor also appears in English fiction as a discourse strategy that reflects the ideological position and internal and external relations of power in response to criticism by some members of society (social criticism). Humorous discourse can regulate social distance between the parties to the dialogue, demonstrate identity, and in an ironic aspect, reveal hypocrisy, hypocrisy, flattery, etc. ugliness in society. Through humor, information is obtained about what is good, what is bad, what is exemplary, what is inappropriate. Through humor, objects that become the target of laughter are accurately determined.

"The general name of this great force, which rests on the arms of satire and humor, is comedy. It is the prey of backwardness and inertia, of vulgarity and ignorance, of oppression and violence, of malice and evil forces, of bribery, meanness, betrayal of the people and wickedness, it is the whip that is applied to them; it is the measure and indicator of a person's negative superiority over others" (Kazımov, 2021, p. 6).

The purpose of the article is to explore the features of humorous discourse in the English language and to determine its pragmatic, linguistic and social functions.

Discussions and results. The prominent figures of English literature – Oscar Wilde, Jonathan Swift, Mark Twain and Jerome K. Jerome created excellent examples of discourse humor. They showed the importance of humor in the formation of the worldview of the English people. The works of these authors emphasize the humorous nature of the English people. Funny jokes, apt anecdotes that are a generalized analogue of life reality, phraseologisms that are an example of high wit, wise words have been a bright hope in the difficult times, hard, tiring days of English life.

They showed that at the center of humorous discourse are various language means and word games (puns), satire, sarcasm, irony, anecdotes, paradoxes, metaphorical expressions and parody (Hajıyeva, 2010).

At the center of humorous discourse are various terminological concepts. For example:

Irony – is an indirect criticism in humorous discourse. Irony is a social message transmitted in a non-sense way.

Sarcasm – open and sharp criticism in humorous discourse.

Anecdote – anecdote, bonding (closeness) is the strengthening of social connections and relationships in humorous discourse.

Satire – unlike humor, social, political and religious criticism in discourse.

Pun – (wordplay) word play, language play, here the semantics of humor in humorous discourse is reflected.

Occasionally, paradoxical humor can also be found in humorous discourse. This humor arises due to the illogicality of the parties.

The main functions of humorous discourse in the text are as follows:

Social Criticism. Through this function, contradictions, contrasts, etc. occurring between members of society are shown with humor.

Identity Display. This function demonstrates identity and social status using the rich tools of the English language.

Power Relations. In this function, a difference in social status is created, and the other party is ironically influenced.

Linguistic Creativity. In this function, humor in discourse is formed by language play, metaphors, paradoxes, as well as transformations (transformations) of lexical units.

Solidarity (Bonding). The essence of this function is as follows: In humorous discourse, the parties come closer to each other through jokes. For example: Algernon – "I never travel without my diary. One should always have something sensational to read in the train". *Self-irony* in this example creates emotional intimacy with the audience by making fun of the character himself and reducing social distance.

Bitterness (biting). This function has an open and sharp criticism content, the parties criticize each other through irony. Lord Darlington – "We are all in the gutter, but some of us are looking at the stars". The speaker claims moral superiority by placing himself in the position of "stargazing". From the point of view of discourse, this is status-creating and critical humor.

Different types of humor are found in discourse:

Joking humor in discourse. This consists of light, and in some cases, stinging expressions. In English, this is called "Teasing". The purpose of using these expressions is not only to create laughter, but also to regulate social relations, emphasize national identity, bring to mind the difference in status, establish a sensory-emotional distance or, conversely, to establish closeness. The teasing of the parties in discourse is called the Bonding and Biting function (Boxer, Contes-Conde, 1977).

In English discourses, this humor both creates a comic mood and, as mentioned above, controls social distance in the communication process. The role of the function in humorous discourse is to create closeness between the parties through friendly jokes. This function both strengthens social connections and relationships and, as they say, warms them up.

Light teasing can also take on an ironic and harsh form in some discourse contexts. This turns into criticism. As a result, the role of this function in discourse is again characterized by creating a status difference and increasing social distance.

In the Identity Display function, the parties introduce themselves. The role of this introduction in discourse is characterized by intelligence and superiority of mind.

In the function called Face-Threating Act, the effect on face protection is expressed. It can be characterized by aspects that can touch the "personal respect" of the other party in discourse.

The essence of the function called Social Correction is that the parties criticize each other indirectly. The role of this criticism in the discourse is to show the subject's mistake without directly expressing an opinion.

Another function is called “Power Control”. This function is aimed at reshaping power in the discourse, showing social hierarchy and status.

Another function is “Humor & Entertainment”. The content and essence of this function is to provide people with comfort through laughter. Its role in the discourse is characterized by lightening the speech and raising the mood.

Approaching humor in the discourse. In this type of humor, the parties tease each other, but the goal is not to embarrass, that is, they do not cause suffering, do not disturb, do not touch the heart, do not offend, do not hurt, in other words, kindness and sincerity are created between the participants in the discourse. For example, an example from Oscar Wilde’s discourse: Algemon: “I hope my cigarette case is not offended by the lack of attention. It has been very lonely without me.” In this humorous discourse, Algernon teases Jack, says things, but the goal is not to hurt, but to create social closeness between them. Creating a sensory-emotional attitude to a household object (a cigarette case) is absurd. This aspect, as it seems, forms the approach humor.

Contrary to the above, humorous discourse is also actively used in English as “Biting Teasing”, that is, the hurtful status of teasing. As it is said, the goal here is to seriously tease the other person, to hurt him, as well as to show his weaknesses or to remind him of his status. Let's look at an example: Lady Bracknell scene: “To lose one parent may be regarded as a misfortune; to lose both looks like carelessness.” Losing one parent may be regarded as a misfortune, losing two parents is already irresponsible. In this discourse, humor is used to demonstrate teasing, intentional hurt, irony and social superiority.

In this discourse, the small approaches the big through a phraseological unit: to make a mountain out of a molehill = to make an elephant out of an ant.

“Is Stephanie making a mountain out of a molehill?”

“Yes, while describing the event, she exaggerates a minor issue and presents it as a serious problem” (Hajıyeva, 2010, p. 71).

Hyperbole-exaggeration also creates humor in many situations.

Identity and status humor in discourse (Identity Display and Social Status).

This humor can also be called identity display and humor. In the issue of the human factor, the display of identity also occupies one of the main places. Through teasing, they also present their superior aspects in the discursive process. The parties want to show themselves as intelligent, superior, cultured, speaking with humor, joking or speaking with sarcasm, etc. For example: go fly a kite – “Yes it`ll be better to say “ I want to be alone”.

The following examples of identity and status humor in English are given. We have also used the same material: Algermon (Wilde): “I never change, except in my affections.” One of the participants in the discourse, as it seems, presents himself to the other as romantic, humorous and attractive. The examples also show that a person’s identity is determined not by his true character, material status, external appearance, but by his image in the social environment. The identity of a person is expressed in different linguistic ways in the discourses of the languages being compared and contrasted. In general, the concept of identity is perceived in discourses as a unit of communication, a result of speech. Messages about a person’s identity and status are sent: Lady Bracknell (about Jack Worthing). “A man should have an occupation of some kind. I do not approve of idleness. It leads to mischief“.

There is an ironic image in this humorous discourse. This function (Identity Performance) can be interpreted as follows: Identity is determined by social roles (Lord, Lady, Banker, Guardian). It is understood in society as a dangerous person who has no work or occupation. Interestingly, Lady Bracknell herself has never worked, but exposes “unemployment”. That is, pay attention to the contrast, the contradiction, aristocrats, intellectuals criticize and criticize those who “do not work” without working themselves. This status can be called irony, moreover, it is a serious social parody.

Identity in humorous discourse is expressed by explicit and implicit means. D. Crystal writes that "when expressing identity explicitly in any discourse, the age of people, as well as the chosen topic, or rather, familiarity with the context, play a key role in differentiating the style of message texts" (Crystal, 2006, p. 156).

Implicit expression of social identity in discourses is observed in many initials. For example: the abbreviation VGC is found in ancient writings – "very good condition" (very before wicket), etc. (İmanova, 2024, p. 21).

The explicit expression of identity in social discourses is also observed in phraseological units. For example: in Azerbaijani, the phraseological unit "oxlov udmaq" expresses negative identity. Negative emotion is manifested in the meaning of this phraseological unit (to pull oneself together, to drag oneself, to walk around, to boast) (Hüseynov, Əhmədov, 2011, p. 199).

In the implicit expression of identity, the emotions of the parties, gestures and facial expressions also play a key role. These gestures and facial expressions can be replaced by a phraseological unit. For example: everyone can imagine the appearance of a person who is afraid of a snake. This is a gesture. But this fear can also be expressed with the invariant phraseological units "İlan vuran ala çatıdan qorxar" / "İlan çalan ala çatıdan qorxar".

Discourse censure humor (Social Correction). In some cases, in a discursive situation, the parties indirectly convey to the other party through humor what they cannot say directly. For example: *It seems to me that you are not late for work again. We just arrived too early.* The humor here has a warning feature. But there is also polite behavior here. Politeness is one of the most important issues in any communication, including discourse communication. Politeness rules, which are the ethics of sociological self-presentation of an individual or organization, are actually the identity of people. "Politeness is an exemplary action; they must be accepted by everyone and be appropriate to a specific situation." Politeness is a system of ethical rules that regulate cultural communication." (Hacıyeva, Məmmədova, Seyidova, 2025, s. 182).

Let us give an example: *She said "I didn't think it's polite to listen".* Oscar Wilde's play "The Importance of Being Earnest" ridicules listening as unacceptable behavior, impoliteness, etc. in that era.

In this situation, the concept of appreciation is revealed. Not everything is appreciated in society. For example: Lady Bracknell writes, "I do not approve of anything that tampers with natural ignorance. Ignorance is like a delicate exotic fruit".

In general, ignorance and darkness have been exposed in English literature throughout history. In this construction, ignorance is presented as if it were a valuable social attribute. L. Bracknell exposes the false identities of English aristocrats based not on knowledge and science, but on image, appearance and social status.

Image is related to self-confidence. Image is a global concept. People, especially business people, attach great importance to image when they are building a discourse with each other. "Image" is used in the meaning of image, appearance, description, picture in English translation. In humorous discourse, image is actually a means of gaining people's sympathy. The value and technological functions of image are applied in humorous discourses. Oscar Wilde does not take humor in imicology only as laughter, but also presents it as an intellectual tool that demonstrates social criticism, identity demonstration and the discursive power of language.

In English literature, many topics are centered on social rules and people's behavior. For example, as in Oscar Wilde's famous play "Importance without seriousness". Humor plays a leading role in that play. Here, humor is used to break the tension in the plot line of the play. Famous writers add humor to serious works to make them more salty and readable.

The value functions we have mentioned include the elevation of personality in discursive conditions, the comfort of interpersonal relationships, and psychotherapeutic functions. With the help of

the right image, a person becomes a person necessary for the social environment, gains the sympathy of the discourse partner, and because of this, communication becomes comfortable, and he gains a constant positive mood.

In Azerbaijani literature, Mir Jalal, in his story "The Rules of Courtesy of a Fresh Wedding", exposes those who turn weddings into a source of income in the name of marrying off sons and daughters. In the end, Teze Bey – Bahlul gets angry, gets angry, loses his temper, and is cursed profusely because the gifts are few and do not satisfy him.

There are rules and customs in life that, although they are not widespread anywhere, are more or less followed by everyone in everyday life. The collection of such well-known "politeness rules" of a newlywed couple, in the language of Bibi, is interesting in terms of the attitude towards anachronisms. Yawning, sobbing, straining, making tea during a conversation, giggling when laughing, muttering under your breath, speaking loudly – all these are negative aspects that create laughter in a conversation (Kazımov, 2021, p. 436).

Technological functions include adaptation between partners, attracting attention, highlighting the best personal and business qualities, overshadowing negative traits in a humorous situation, removing age-related obstacles. This means that a person enters any social environment thanks to his correct and humorous image, attracting attention with all his features.

Humor to enliven the environment in discourse. The British call it "Entertaining Teasing". This humor is a tease used to completely entertain the partners, create comedy and lighten the conversation. The main purpose of this teasing is not to offend, expose and create a status difference, but simply to enliven the environment, create a funny atmosphere, and ensure people's social comfort. For example, the following syntactic construction from Oscar Wilde's "Entertaining Teasing": Algernon: *I really don't know what a Gwendolen would do without me. I think she`d lose her reason.* In this sentence, the teasing and touching does not seem serious, it does not hurt Gwendolen, it simply makes fun of herself and praises her. At this point, the discourse is formed at the level of a funny dialogue, fun and romantic humor.

Types of teasing include bonding, biting, identity teasing, corrective teasing, and entertaining teasing. These different types establish social relationships between discourse participants, provide friendly criticism, expect hurt, distance, demonstrate identity and status, and warn against fun, joking behavior through humor.

Research on humor in the English literary environment began in the 1970s. Humorous activity is first described. Conversations are filtered through discursive analysis. In this way, interactive sociolinguistics is developed. These points reveal the content of the conversation in interaction and relationship, and allow for more detailed exploration of these issues. The research of that period was able to show how jokes can work as a strategy to strengthen the content and intimacy of people, as well as to control the conversation, such humor creates conditions for friendly communication and helps to discuss and evaluate the social identities of the interlocutors. Of course, the existing works on the issue of humor in discourse are not satisfactory. From this it can be concluded that humorous discourse provides an intensive study of the language not only from a theoretical point of view, but also from a practical point of view and manifests itself more at the phraseological level of the language system.

Conclusions. The study showed that carrying out a monographic study of humorous discourse together with other languages can give good results. Thus, English and Azerbaijani languages have specific features, therefore, a humorous act can be perceived differently in these languages, and especially it can manifest itself more when translated from one language to another.

The research materials once again prove that humor plays an important role in pragmatic, linguistic and social discourses.

The main features of humorous discourse are also measured by its numerous functions. That humor brings people closer together, defines identity and status, and rebukes those who have flaws.

When we pay attention, we see that in order to create humor in discourse, it is necessary to use various means of language correctly. One of them is the phraseological fund of English and Azerbaijani languages. Since the rich phraseological means of both languages have the properties of imagery, emotionality, and expressiveness, they act as an important linguistic factor that determines the vivid expression of thought and the beauty of form in fiction.

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DOI https://doi.org/10.30525/2592-8813-2026-2-63

COMPARATIVE ANALYSIS OF MULTIMODALITY IN BRITISH TABLOID AND BROADSHEET NEWSPAPERS

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Abstract. The present study examines multimodal strategies in British tabloid and broadsheet newspapers within contemporary media discourse. It focuses on the interaction of verbal and visual semiotic resources in British journalism and their role in pragmatic influence, ideological framing, and stylistic organization of news texts.

The empirical corpus includes 120 articles published between 2023 and 2024 in *The Guardian*, *The Times*, *The Daily Telegraph*, *Daily Mail*, and *The Sun (*24 articles from each newspaper). The study applies multimodal discourse analysis, stylistic analysis, and qualitative content analysis. The research explores the communicative functions of photographs, headlines, typography, color schemes, page layout, infographics, and digital interactive elements in constructing readers' perception and emotional engagement. The findings demonstrate that tabloids prioritize emotionally intensive and visually dominant strategies, while broadsheets employ analytical, information-oriented multimodality. The results confirm that multimodality functions as a key mechanism of persuasion and ideological representation in contemporary British journalism.

Key words: British newspapers, broadsheet press, media discourse, multimodality, pragmatics, tabloid press, visual communication.

Introduction. Contemporary journalism has undergone significant transformation due to digitalization and media convergence. News discourse can no longer be understood as purely verbal, as meaning is constructed through the interaction of linguistic, visual, spatial, and digital semiotic resources.

Multimodality refers to the integration of multiple communicative modes within a single semiotic structure (Kress & van Leeuwen, 2006). In media discourse, meaning emerges through the interaction of text, image, typography, and layout, which jointly guide interpretation and shape audience perception (Jewitt, 2014).

Recent studies further emphasize that multimodal literacy has become a key component of media communication in digital environments, where meaning is constructed through the interaction of textual, visual, and technological resources (Serafini & Reid, 2019). British newspapers provide a particularly relevant context for multimodal analysis due to the traditional distinction between tabloids and broadsheets. Tabloids such as *Daily Mail* and *The Sun* rely on emotional intensity and visual dramatization, while broadsheets such as *The Guardian* and *The Times* emphasize analytical structure and informational balance.

The results also support discourse-oriented approaches that view media texts as complex communicative systems in which linguistic, pragmatic, visual, and contextual factors interact in the construction of meaning (Mammadov, 2018; Mammadov, 2026).

The relevance of this study lies in the growing importance of visual communication in journalism and the need for comparative analysis of multimodal strategies across newspaper types.

The aim of the article is to identify and compare multimodal strategies employed in British tabloid and broadsheet newspapers and to determine their pragmatic and stylistic functions within contemporary media discourse.

The novelty of the study lies in the fact that unlike previous studies focusing primarily on either visual communication or political discourse, the present research provides a comparative analysis of multimodal strategies in both tabloid and broadsheet newspapers within a unified analytical framework.

Materials and Methods. The corpus consists of 120 articles published between January 2023 and December 2024 across five British newspapers: *The Guardian*, *The Times*, *The Daily Telegraph*, *Daily Mail*, and *The Sun*. The dataset includes 60 broadsheet and 60 tabloid articles. Articles were selected using purposive sampling based on thematic comparability (political, social, and cultural news) and the presence of both textual and visual elements. The analysis applies multimodal discourse analysis, visual grammar theory (Kress & van Leeuwen, 2006), and qualitative stylistic interpretation. Attention is given to headlines, imagery, typography, layout, and infographics as integrated semiotic resources.

Theoretical Foundations of Multimodality. Multimodality is understood as the interaction of multiple semiotic modes within a unified communicative system (Bateman et al., 2017). Media texts integrate linguistic and visual resources to construct meaning beyond verbal language alone.

Multimodal analysis enables researchers to examine not only the structural organization of media texts but also their ideological and pragmatic dimensions (Machin, 2007; O'Halloran, 2011). O'Halloran argues that multimodal discourse analysis provides a systematic framework for investigating how different semiotic resources interact in the production of meaning within complex communicative environments. A significant contribution to multimodal theory was made through the development of the concept of visual grammar, which conceptualizes visual communication as a structured semiotic system comparable to language (Kress & van Leeuwen, 2006). From a critical discourse perspective, multimodal structures also serve ideological and pragmatic functions, shaping perception and reinforcing particular interpretations of social reality (Fairclough, 1995; Machin, 2007).

In digital journalism, multimodality is intensified through interactive and multimedia elements, further expanding the communicative complexity of news discourse. Contemporary online newspapers increasingly encourage audience participation through comment sections, reader feedback mechanisms, and interactive communication formats. Such developments transform traditional newspaper discourse into a more dialogic form of media communication, where readers become active participants in the construction and circulation of public opinion (Richardson & Stanyer, 2011).

Pragmatic Functions of Multimodality in British Newspapers. The pragmatic dimension of multimodality is closely associated with mechanisms of audience influence, emotional engagement, and ideological framing within contemporary media discourse. British newspapers actively employ multimodal resources in order to guide readers' interpretations of political, social, and cultural events. In this context, visual and verbal elements function not independently but as interconnected components of persuasive communication.

Researchers in media discourse studies emphasize that multimodal organization significantly affects the cognitive and emotional perception of information (Fairclough, 1995; Kress & van Leeuwen, 2006). Visual composition, typography, photographs, color schemes, and page structure contribute to the formation of evaluative meanings and ideological positioning within newspaper discourse.

Tabloid newspapers generally prioritize emotionally intensive and sensational forms of communication. Their multimodal strategies are primarily aimed at attracting immediate attention and generating strong affective responses from readers. Broadsheet newspapers, by contrast, tend to emphasize analytical interpretation, informational credibility, and contextual explanation through more restrained multimodal organization.

One of the central pragmatic functions of multimodality is persuasive influence. Newspaper layouts, visual framing, and typographic organization shape readers' perception of events and reinforce particular ideological interpretations. During Brexit coverage, for instance, British newspapers

employed different multimodal strategies reflecting their editorial orientations and communicative objectives. Research on Brexit-related newspaper discourse demonstrates that visual representations often function through multimodal metonymy, where political figures, national symbols, and institutional imagery are used to construct broader ideological meanings and persuasive narratives (Tasić & Stamenković, 2022).

The Daily Telegraph frequently incorporated patriotic visual symbolism, including national flags, emotionally expressive political photographs, and visually dominant headlines. Such multimodal strategies contributed to the construction of ideological narratives associated with national identity and political sovereignty. The interaction of visual and verbal framing strategies in British political journalism strengthens ideological positioning through patriotic imagery and typographic emphasis (Marriner, 2005). In the analyzed article, bold headlines, emotionally expressive photographs, and symbolic national imagery reinforced persuasive interpretation and intensified readers' emotional engagement.

For example, *The Daily Telegraph* article "Sunak gambles on snap poll" (*The Daily Telegraph, 23 May 2024*) combines a large central political photograph, a hierarchically organised page layout, and visually salient headline typography. The front-page design places particular emphasis on the image of Prime Minister Rishi Sunak during the announcement of the general election, while the headline structure reinforces the idea of political risk and strategic decision-making. The interaction between visual framing and verbal messaging contributes to the construction of political narratives associated with leadership, national stability, and electoral responsibility. The multimodal organisation guides readers' interpretation through the coordinated use of imagery, typography, and textual argumentation while preserving the analytical style characteristic of broadsheet journalism.

In contrast, *The Guardian* generally employed more restrained visual structures that emphasized analytical interpretation and socio-political complexity. Its multimodal organization often included informational diagrams, analytical infographics, and balanced compositional layouts designed to contextualize political developments rather than provoke immediate emotional reactions. Such visual organization reflects the newspaper's orientation toward explanatory journalism and interpretative depth.

For example, *The Guardian* article "Twelve charts that show how Labour won by a landslide" (*The Guardian, 5 July 2024*) integrates multiple statistical charts, electoral maps, and data visualisations to explain the outcomes of the UK general election. The article presents voting patterns, turnout dynamics, and constituency-level results through structured graphical representation rather than emotionally charged imagery. The interaction between verbal commentary and visualised data facilitates analytical interpretation and supports readers' understanding of complex electoral shifts, exemplifying the explanatory multimodal strategies characteristic of quality journalism.

For example, *Daily Mail* frequently employs expressive facial imagery, close-up photographs, and visually contrasting compositions in its coverage of celebrity scandals and political controversies. Contemporary tabloid discourse often relies on emotionally framed visual representation in order to intensify sensationalist interpretation and maximize audience engagement. The visual emphasis on facial expressions, conflict, and emotional tension contributes to heightened reader involvement and reinforces evaluative framing.

A representative example can be observed in the Daily Mail article "More than 24,000 migrants have now crossed the Channel this year after another 700 were intercepted" (Daily Mail, 22 September 2024). The report combines a prominently positioned headline with large-scale photographs depicting migrants arriving on the British coast after being brought ashore by Border Force vessels. The visual emphasis on crowd size, facial expressions, life jackets, and geographical proximity reinforces the evaluative framing of migration as a pressing social and political issue. The interaction between the headline and photographic imagery contributes to emotional engagement and exemplifies the multimodal persuasive strategies characteristic of British tabloid journalism. Through the coordinated use

of visual and verbal elements, the article intensifies the perception of urgency and public concern frequently associated with migration coverage in the British popular press.

Broadsheet newspapers, by comparison, generally utilize more context-oriented and informationally balanced visual representation. Images are integrated into broader analytical narratives and typically function as explanatory supplements rather than purely emotional triggers. Photographic material in broadsheets is often combined with statistical graphics, informational diagrams, and contextual commentary that support analytical interpretation.

Typography also performs an important pragmatic function within British newspaper discourse. Large capitalized headlines, contrasting fonts, and bright visual accents in tabloids intensify emotionality, urgency, and dramatic effect. For instance, *The Sun* frequently employs highly expressive headline constructions characterized by evaluative language, concise syntax, and persuasive framing. The headline *"It Is Time for a Change"*, published on 3 July 2024 during the UK general election campaign, illustrates how a short and emotionally resonant slogan can function as both a political message and a persuasive multimodal device aimed at attracting immediate audience attention and encouraging ideological alignment (*The Sun, 2024*). Such typographic organization contributes to dramatic framing and creates an immediate emotional response.

Broadsheet newspapers, on the other hand, generally prefer restrained typography, balanced visual hierarchy, and compositional moderation. Their typographic organization reflects the conventions of analytical journalism and contributes to the perception of informational reliability and institutional authority. Consequently, multimodal organization in British newspapers functions as an essential mechanism of pragmatic influence, shaping audience interpretation through the interaction of verbal, visual, and compositional resources.

Stylistic Differences Between Tabloid and Broadsheet Newspapers

The stylistic organization of British newspapers demonstrates substantial differences in multimodal composition, verbal structure, visual hierarchy, and pragmatic orientation. The distinction between tabloids and broadsheets is manifested not only in journalistic content but also in the stylistic principles underlying media text construction and audience engagement.

Contemporary scholars emphasize that newspaper style is inseparable from multimodal organization. According to Machin, visual composition, typography, image placement, and page structure function as ideological and stylistic mechanisms shaping readers' interpretation and perception (Machin, 2007). Within this framework, tabloids and broadsheets represent two distinct communicative models in British journalism.

Tabloid Newspapers

Tabloid newspapers prioritize emotional expressiveness, visual dominance, and sensational presentation. Their stylistic organization is designed to attract immediate attention, intensify emotional involvement, and maximize audience engagement.

The principal stylistic features of tabloid newspapers include oversized and emotionally charged headlines, intensive use of photographs, fragmented information structures, simplified syntax, colloquial vocabulary, dramatic visual contrasts, and a clear prioritization of visual impact over analytical depth.

The Sun regularly constructs highly expressive headlines aimed at generating emotional immediacy and dramatic effect. For example, the headline "CHAOS" (*The Sun, 23 May 2024*), published following Prime Minister Rishi Sunak's announcement of a snap general election, illustrates the use of syntactic brevity, evaluative framing, and visually dominant typography characteristic of British tabloid journalism. The one-word headline functions as a powerful interpretative frame, encouraging readers to perceive the political situation through the lens of instability and uncertainty. Combined with large-scale visual imagery and prominent page design, the headline reinforces emotional engagement and contributes to the sensationalist representation of political events frequently associated with

tabloid discourse. The visual organisation accompanying such headlines further amplifies dramatic framing and strengthens the persuasive impact of the publication.

Similarly, *Daily Mail* frequently employs multimodal dramatization through the interaction of expressive headlines, emotionally charged photographs, and contrasting visual composition. For example, the article "More than 1,000 migrants cross Channel in a single day" (*Daily Mail, 3 September 2023*) combines a prominently displayed headline with large-scale photographs of migrant boats and visually dominant page design. The interaction of quantitative emphasis, evaluative lexical choices, and emotionally salient imagery reinforces a sense of urgency and crisis. Migration-related coverage in British tabloids often combines evaluative lexical structures with visually dramatic framing strategies designed to intensify ideological polarization and emotional tension. Large-scale images, contrasting visual elements, and expressive photographic framing contribute to the construction of emotionally persuasive narratives and shape public perceptions of migration-related issues.

Another characteristic feature of tabloid discourse is the personalization and dramatization of political communication. Political figures are frequently represented through close-up emotional photographs, expressive facial imagery, and simplified interpretative frameworks that reduce political complexity to individualized emotional narratives.

Fragmentation also constitutes an important stylistic characteristic of tabloids. Information is typically divided into short paragraphs, highlighted quotations, visually isolated textual blocks, and simplified informational units. Such organization facilitates rapid reading and corresponds to the logic of digital media consumption and audience scanning behavior.

In online versions of tabloid newspapers, multimodality becomes even more intensive through the integration of video fragments; animated visual elements; interactive hyperlinks; embedded social media content; click-oriented visual design.

Consequently, tabloids construct a highly dynamic multimodal environment aimed at maximizing emotional response, audience interaction, and continuous reader engagement.

Broadsheet Newspapers

Broadsheet newspapers demonstrate a more restrained, analytically oriented, and informationally structured multimodal organization. Their stylistic structure is generally associated with credibility, intellectual authority, and interpretative depth.

The principal stylistic features of broadsheets include balanced visual hierarchy; moderate use of photographs; extended analytical commentary; informational infographics; complex syntactic structures; neutral and formal vocabulary; restrained typography; structured compositional organization.

Unlike tabloids, broadsheets employ multimodal resources primarily to support analytical interpretation and contextual explanation rather than emotional dramatization.

For instance, the article "July was world's hottest month on record, climate scientists confirm" (*The Guardian*, 8 August 2023) illustrates the role of multimodal organization in constructing analytical environmental reporting. The article combines documentary photography, statistical climate data, and explanatory textual commentary, creating a balanced multimodal structure that supports readers' understanding of complex environmental processes. Visual and textual elements function together as complementary resources contributing to informational credibility and interpretative depth.

Similarly, the article "Monday was hottest day for global average temperature on record, as climate crisis bites" (*The Guardian*, 4 July 2023) demonstrates how visual imagery and data-driven reporting are integrated within broadsheet journalism. The interaction of documentary photographs, scientific statistics, and restrained visual hierarchy facilitates analytical interpretation while maintaining the newspaper's characteristic informational style.

Environmental reporting in broadsheet newspapers often integrates statistical graphics, diagrams, and contextual visualizations that contribute to informational depth and analytical interpretation. In such cases, visual elements function as explanatory mechanisms intended to clarify complex political, environmental, or economic processes.

In addition, *The Times* employs analytical visual structures in political and economic reporting. A notable example is The Times article "Inflation drops to 2.3%, raising hopes of rate cut" (*The Times, 22 May 2024*), where statistical data, numerical indicators, and a restrained visual hierarchy are integrated into the article design. The presentation combines verbal explanation with economic data and graphical elements that facilitate readers' understanding of complex financial developments. The multimodal organisation supports analytical interpretation by coordinating textual commentary with visualised information, thereby enhancing the accessibility of economic reporting while maintaining the objective and informative style characteristic of broadsheet journalism.

Economic journalism in broadsheet newspapers typically combines data visualization, structured page composition, and analytical commentary in order to facilitate interpretative understanding rather than emotional reaction. Visual components therefore function as supplementary informational resources supporting textual analysis.

Broadsheets also demonstrate greater lexical complexity and syntactic sophistication. Their discourse frequently incorporates expert quotations, statistical references, analytical argumentation, intertextual references, and institutional terminology.

Typography in broadsheets is generally restrained and organized according to principles of informational hierarchy and compositional balance. Headlines tend to be descriptive rather than sensational and are designed to communicate informational relevance instead of emotional urgency.

For instance, *The Daily Telegraph* frequently employs visually balanced layouts and moderate typographic emphasis in political reporting. Political articles often combine institutional visual design with relatively formal linguistic presentation, thereby reflecting ideological positioning while maintaining analytical structure and institutional credibility.

A representative example can be observed in *The Daily Telegraph's* coverage of the UK general election announcement on the front page published on 23 May 2024, where the newspaper combines a prominent political photograph of Prime Minister Rishi Sunak with a structured headline hierarchy and restrained typographic composition. The layout emphasizes clarity and informational hierarchy rather than sensational disruption, while the visual framing supports themes of political leadership, national governance, and electoral responsibility. The interaction between visual arrangement and verbal presentation reflects the broadsheet's tendency toward controlled ideological signalling within an analytically structured format.

Comparative Perspective. The comparison of tabloid and broadsheet newspapers demonstrates that multimodal stylistics directly reflects broader communicative strategies, editorial ideologies, and audience expectations.

Tabloids primarily prioritize emotional immediacy, sensational framing, visual dramatization, simplified interpretation, and rapid audience engagement.

Broadsheets, by contrast, prioritize analytical depth, informational credibility, contextual explanation, balanced multimodal organization, and interpretative complexity.

Despite these distinctions, both newspaper categories increasingly integrate digital multimodality into online journalism. Interactive graphics, multimedia storytelling, hyperlinks, video content, and social media integration have become common elements of contemporary British newspaper discourse regardless of newspaper type.

Therefore, stylistic differences between tabloids and broadsheets are manifested not only at the verbal level but also through multimodal organization, visual composition, typographic structure, and pragmatic mechanisms of audience influence.

Discussion. The findings show that multimodality functions differently in tabloids and broadsheets due to editorial ideology and audience expectations.

The study also demonstrates the increasing convergence of traditional journalism and digital storytelling practices, where multimodal narrative strategies contribute to audience engagement and

participation across digital platforms (Page, 2018). Tabloids rely on emotional amplification, visual dramatization, and simplified framing to ensure rapid engagement. Broadsheets prioritize analytical depth, informational credibility, and contextual explanation.

However, digital journalism has led to partial convergence of these strategies. Both newspaper types increasingly use interactive graphics, multimedia content, and online visual storytelling. This suggests that multimodal strategies are no longer strictly determined by newspaper category but are increasingly shaped by digital platform affordances and audience behavior. Multimodality therefore functions not only as a stylistic feature but also as a mechanism of ideological construction and audience engagement.

Conclusion. The study confirms that multimodality is a fundamental feature of contemporary British newspaper discourse. Tabloids and broadsheets differ significantly in their multimodal strategies: tabloids emphasize emotional intensity and visual impact, while broadsheets prioritize analytical structure and informational clarity. The interaction of verbal and visual elements serves as a key mechanism of pragmatic influence and ideological framing in media discourse. Digital transformation has intensified multimodal complexity across all newspaper types, leading to hybrid forms of journalistic communication. Multimodality should therefore be understood as both a stylistic and ideological mechanism shaping contemporary media interpretation. The findings should be interpreted with regard to the corpus size and the selected group of newspapers.

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DOI https://doi.org/10.30525/2592-8813-2026-2-64

THE POETICS OF MYTHIC CONSCIOUSNESS: WORD, MOTHER, AND CREATION IN THE CREATIVE WORK OF MAHIRA NAGHIGHIZI

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Abstract. In recent years, mythopoetic research in world literary scholarship has undergone a renewed surge of interest, as the enduring presence of archaic mythological worldviews in modern literary masterpieces has generated considerable scholarly attention and given rise to new literary-philosophical perspectives. The intersection of myth and poetry continues to be actively studied as a significant arena of research from both national and comparative literary-theoretical standpoints. This article aims to investigate the poetics of mythic consciousness in the creative work of Mahira Naghighizi – a prominent representative of twenty-first-century Azerbaijani poetic thought, an Honored Teacher, laureate of the "Golden Pen" award, public figure, and poet-professor – with particular focus on the artistic system of the Word, Mother, and Creation archetypes from a mythopoetic perspective. Selected poetic examples from the poet's various collections have been analyzed using the mythocritical method, as well as C.G. Jung's archetypal theory, M. Eliade's concept of mythic creation, and the views of several Turkish scholars on water cult. The research demonstrates that in Mahira Naghighizi's (Huseynova's) poetry, the cosmogonic function of the Word operates as a fundamental principle of mythocosmoqony; the image of the Mother undergoes transformation into the archetype of "White Mother/Earth Mother/Humay Mother", thereby acquiring a sacred-mythic significance. Furthermore, the poetic sublimation of the Water mythic cult, the artistic reflection of the Fate archetype, and the embodiment of the genetic-archaic traces of shamanism in poetic examples clearly emphasize the continuity of the Oghuz-Turkic mythic memory within the contemporary artistic system. The analysis reveals that twenty-first-century Azerbaijani poetry continues to make new contributions to its study within the context of world mythopoetic tradition, confirming that it offers rich poetic material for monographic research in this field.

Key words: mythopoetics, archetype, Mother image, Water cult, cosmogony, Mahira Naghighizi, Azerbaijani poetry.

Introduction. In contemporary literary-theoretical thought, the investigation of myth's poetic function holds particular scholarly significance. From the second half of the twentieth century onward, C.G. Jung's archetypal theory, M. Eliade's concept of mythic creation, and G. Bachelard's studies on the symbolism of elements have established the principal theoretical direction of mythopoetic analysis in world literary scholarship. This theoretical approach is also gradually developing within Azerbaijani literary studies, with the mythopoetic structure of the national poetic heritage being re-evaluated through valuable new methodological perspectives.

The period spanning the late twentieth and early twenty-first centuries represents a distinctive phenomenon in Azerbaijani poetry – a return to national-moral values and a renewed expression of archaic mythic memory in the contemporary artistic language. Mahira Naghighizi – one of the prominent poets of this period, author of more than twenty collections of poetry, Honored Teacher of the Republic of Azerbaijan, laureate of the "Golden Pen" award, public figure, and professor – has transformed herself through her verses into a poetic vessel of national-moral values. Raised from childhood in an atmosphere of folk tales, bayatis, lullabies, the art of ashiq poetry, and the dastan tradition, the poet's artistic worldview encompasses the deep strata of Oghuz-Turkic mythic consciousness.

The aim of this article is to investigate the artistic expression of mythic consciousness in Mahira Naghighizi's poetic system – particularly the remythologization of the Word, Mother, and Creation archetypes – using the mythopoetic method of analysis. The selected poetic examples from the poet's

collections “My Mother”, “Pour Water Behind Me, Mother”, “The Wisdom of the Word”, and other works serve as the analytical material. Jung's theory of the collective unconscious and archetypes, Eliade's concept of eternal return and cosmogonic myth, as well as Bachelard's symbolism of water and fire, and the research of İnan and Türkyılmaz on various archetypes, constitute the theoretical-methodological foundation of this work.

The research demonstrates that Mahira Naghighizi's creative work is a luminous example of the continuity of mythic memory in the contemporary literary environment, and presents rich scholarly material for monographic research in this field.

Theoretical and methodological framework. The theoretical foundation of this research draws upon C.G. Jung's archetypal theory, M. Eliade and Akman's cosmogonic myth concepts, the water cult studies of İnan, Akman, and Türkyılmaz, as well as G. Bachelard's research on elemental symbolism. The theoretical propositions of the scholars mentioned provide the scholarly basis for interpreting the mythopoetic structure of Mahira Naghighizi's creative work – the archetypes of Word, Mother, Water, Faith, and Fate.

Main text.

The Cosmogonic Function of the Word

To understand the mythopoetic structure of Mahira Naghighizi's creative work – a poet who continues the tradition of “fidelity to national-moral values” in contemporary Azerbaijani poetry – one must first examine her relationship to the concept of “word”, which is among the most essential factors to consider. Her aphorism “The Word is power! The Word is wisdom, meaning, and logic” (Huseynova, 2012, p. 5), while appearing at first glance to express devotion to the artistic word, harbors within its deep semantic layer a distinctly mythopoetic essence. According to M. Eliade's theory of cosmogonic myth, in archaic thought the word/utterance is the primordial instrument of creation – the world comes into being through the word, and exists by means of the word (Eliade, 2000, p. 268). It is precisely in this context that Mahira Naghighizi's treatment of the word as “power”, “wisdom”, and “logic” reveals her profound intuitive sense of its mythic cosmogonic function.

As the poet herself has noted, “a word left unspoken in the heart – burns, kills, takes life”:

It burns, scatters my ashes to the sky,
The word I have pressed and kept within my heart.
It does not kill – it slowly takes my life,
The word I left unspoken in my heart. (Huseynova, 2012, p. 8)

In this poetic fragment, mythopoetic moments emerge not in “naked” form, but cloaked in a deep artistic-aesthetic veil. Two fundamental mythopoetic concepts resonating with Jung's theory of the collective unconscious come to the fore here. First, the concept of birth: the word that has fallen into the poet's cosmogonic womb must inevitably “come into the world”, must “be born” – for according to the dialectics of the Oghuz-Turkic thought system, creation is a ceaselessly existing process. Second, the concept of creation passing through death: every act of creation necessarily entails death. The word “scattering ashes to the sky” and “slowly taking life” – this is precisely the poetic expression of the death-birth dialectic.

In one of her journalistic articles, Mahira Naghighizi notes: “My Great Creator created man through the word.” This idea expresses that her worldview and her thoughts on life, the world, humanity, and society are infused with divine values; that, as in ancient Oghuz-Turkic thought, Myth and Religion coexist in divine harmony. In this sense, Mahira Naghighizi's system of thought does not remain at the level of narrow philosophical fragments, but encompasses the boundaries of the truths of existence. This is why her poetry reflects wholeness, completeness, and eternal truths.

Thus, Mahira Naghighizi conceptualizes the word not as a simple verbal phenomenon, but as a cosmogonic being possessed of magical-mythological power – one whose every birth gently takes the life of its creator, invisibly sublimating their very existence into the artistic word.

The Mythic Transformation of the Mother Archetype

C.G. Jung identified the "Great Mother" archetype as one of the most powerful archetypes of the collective unconscious and demonstrated that it carries universal character across all world mythologies (Jung, 1968). In Mahira Naghighizi's creative work, the Mother image may justifiably be understood as the poetic expression of this universal archetype within a national-mythic framework. For research reveals that in M. Naghighizi's artistic imagination, the power of the mother she evokes acquires cosmic dimensions:

The universe is illuminated by your light,
My heart is kindled by that fire – my mother. (Huseynova, 2006, p. 23)

According to Bachelard's "Psychoanalysis of Fire", fire in archaic thought bears an ambivalent nature – both creative and destructive (Bachelard, 1938). In Mahira Naghighizi's verse, however, this fire is born from the mother's heart – meaning the Mother herself becomes the cosmogonic creative force. The attribution of light, radiance, and fire as emanating from the Mother directly connects the poet to the "White Mother" archetype of Turkic mythology – the primordial creator figure, the image of the ancient woman.

The identification of the mother's smile with the sun represents yet another fascinating manifestation of this archetype:

If only a smile were to alight upon her lips,
It would be as though the sun fell upon Shahdagh. (Huseynova, 2012, p. 14)

This stanza, resonating with the motif in the Azerbaijani fairy tale tradition where the embodiment of feminine beauty causes flowers to fall from her lips when she smiles, artistically expresses the triad of Sun//Smile//Creation. Calling her mother "the mother of all mothers", the poet elevates her from human hypostasis to the universal "Mythic Mother" archetype. This image in her poetry is a metaphoric figure standing between Earth and Sky, ordering the cosmos:

You are the summit of the highest mountain,
You are far more ancient than this old world.
You are as beautiful as an angel descended from heaven,
You are the mother of the world itself, Mother! (Huseynova, 2007, p. 12)

Within the framework of the concept of "sacred space", Eliade interprets the mountain peak as the axis mundi – the axis of the world, the point where heaven and earth converge (Eliade, 2000). Accepting the mother as the creator of this summit fully reveals her sacred significance within the Earth Mother archetype.

The Poetic Sublimation of the Water Cult

In Mahira Naghighizi's creative work, images related to water bear a distinctive mythopoetic significance. The great Turkish scholar A. İnan provided scientifically valuable foundations for the deep reverence that Turkic peoples hold for water. In his research it is noted that "the Bashkirs would bring their new brides to the water's edge, speak words such as 'water passed down from ancestors, water passed down from mothers,' and cast a piece of the bride's possessions into the water for good fortune" (İnan, 2007, pp. 55-56). This fact demonstrates that the sanctification of water is a genetic belief embedded in the deep layers of Turkic peoples' mythic memory, transmitted from generation to generation. Türkyılmaz's research also supports this view: the sanctification of water by the Turkic peoples is distinguished by a number of fascinating and original aspects (Türkyılmaz, 2013, p. 86). According to Eliade and Akman, "immersion in water represents a transition from old life to new life, from death to birth, and also a return of the soul to the material world" (Eliade, 2000; Akman, 2002, p. 2).

It is precisely this ancient mythic belief, revealing motifs of shamanism, that is reborn in Mahira Naghighizi's poetry wearing a distinctly personal poetic guise:

I shall find good fortune and luck,

Pour water behind me, Mother!
I shall emerge into the light,
Pour water behind me, Mother! (Huseynova, 2007, p. 11)

The surface meaning of the poem is simple – a child departing from home asks the mother to pour water behind them. But in the implicit semantic layer of this poem by Mahira Naghighizi, a mythopoetic content is concealed that can only be uncovered through deep analysis. The lyrical hero does not wish to be separated from the mother – this is profoundly difficult for them. Nevertheless, they must leave home and fulfill their life's mission. The solution is found in the mother's pouring of water behind them. This water is the poetic expression of a mythic protective spirit: the mythic guardian whom the White Mother dispatches with her child – an angel who will protect them from evil, from misfortune, from all dangers.

May there be peace and safety,
May the road be auspicious,
May there be remedy for every sorrow,
Pour water behind me, Mother! (Huseynova, 2007, p. 11)

By infusing the metaphysical functions of water – peace, good fortune, remedy – into the poetic fabric of this poem, Mahira Naghighizi skillfully translates the national mythic memory into the contemporary artistic language. In this respect, the poet's creative work reflects a living poetic proof of A. İnan's scholarly propositions.

The Faith Archetype: The Poetic Pillar of the Mythic World

In Mahira Naghighizi's creative work, faith occupies a special place as the most significant poetic marker of myth. The very core of the poet's entire artistic-aesthetic system is constituted by the faith archetype. However, this archetype – unlike in other poets – is not confined to a universal religious-philosophical sphere: its initial and final point is the mother. This originality represents the most significant aspect of the specific character of Mahira Naghighizi's mythopoetic thought.

In the poet's inner world, all branches of faith – faith in the earth, faith in the word, faith in God, faith in the future – converge around the image of the Mother and draw their source from her. In this regard, the Mother is not merely a mythic creative force, but also the pillar of faith, the sacred point of support. The most powerful aspect of the "Great Mother" archetype in Jung's theory – its function as shelter, support, and primordial source of trust for all – fully affirms itself in Mahira Naghighizi's poetic system:

The universe is illuminated by your light,
My heart is kindled by that fire – my mother. (Huseynova, 2006, p. 23)

The illumination of the universe by the mother's light demonstrates that faith has acquired cosmic dimensions. For the poet, faith in the world, faith in life, faith in people, faith in beauty, faith in justice – all are connected to this primordial source of light: the mother. Resonating with Bachelard's proposition that "fire is the primordial energy of life", in this artistic image faith comes alive not as an abstract religious concept, but as a mythological truth burning like fire, born from the mother's heart and very being.

Notably, Mahira Naghighizi's faith archetype also manifests its unity with mythic memory. In the poet's unconscious, shaped since childhood in an environment connected to oral folk literature, faith always exists as a living, active, creative force. This faith, harmonizing with national-moral values and Oghuz-Turkic cosmogonic thought, shapes Mahira Naghighizi's poetry into a whole, complete, and internally harmonious artistic system.

The Artistic Reflection of the Fate Archetype

In Azerbaijani oral and written literature, the Fate archetype – the personification of destiny, the turning of the world – occupies a distinctive place as one of the universal images of mythic thought. Mahira Naghighizi revives this archetype in her poetic works, imbuing it with individual-lyrical nuances:

It blocks my door and stands in wait,
It strikes wound upon wound.
It plots ruse, trick, and trap,
This fate does not grow weary. (Huseynova, 2012, p. 144)

This Fate image – a poetic projection of Jung's "shadow" archetype – is the artistic expression of the oppositions of light/darkness, good/evil, creation/destruction, cosmos/chaos in Mahira Naghighizi's cosmogonic thought. That Fate "plots ruse, trick, and trap" in the poem demonstrates its role as a symbol of chaotic (disordering) force, the mythic destructive power that is the antithesis of cosmogonic order.

Conclusion. Thus, from our research it becomes evident that Mahira Naghighizi's creative work represents the most consistent and nearly wholly complete poetic expression of national-moral values and archaic mythic memory in contemporary Azerbaijani poetry. The poet's artistic world, drawing sustenance from the deep strata of Oghuz-Turkic cosmogonic thought, skillfully conveys to the reader the remythological function of that tradition in the contemporary poetic language.

The research yields the following conclusions:

First, the core of Mahira Naghighizi's poetic system is constituted by the cosmogonic function of the Word. For the poet, the word is not a simple verbal phenomenon – it is the primordial instrument of creation, a being possessed of magical-mythological power. This approach directly establishes her as an heir of Oghuz-Turkic mythic thought.

Second, the Mother archetype in Mahira Naghighizi's creative work emerges from human hypostasis to become the contemporary poetic expression of the "White Mother/Earth Mother" archetype. Adorned with cosmogonic images such as light, radiance, fire, and the mountain summit, the Mother image represents both the creative mythological force and the pillar of the poet's entire system of faith.

Third, the poetic sublimation of the Water cult fully resonates with the scholarly propositions of A. İnan, Eliade and Akman, and Türkyılmaz. Mahira Naghighizi not only preserves this ancient Turkic belief in her poetic thought – she imbues it with new artistic breath, reactualizing it for the contemporary reader.

Fourth, the Faith archetype runs through the center of all these mythopoetic structures – the artistic crystallization of the deep trust that Oghuz-Turkic mythic consciousness places in humanity, the world, and the future constitutes a specific characteristic living in the poet's works.

Fifth, the Fate archetype functions as the poetic expression of the oppositions in the poet's cosmogonic world model – good/evil, creation/destruction, chaos/cosmos – and completes the wholeness of Mahira Naghighizi's mythic world image.

In general, Mahira Naghighizi's poetry vividly reveals that the national mythic memory not only survives in the contemporary literary environment, but has acquired new artistic-aesthetic possibilities. This creative work simultaneously demonstrates the organic connection of contemporary Azerbaijani poetry with the world mythopoetic tradition. The research creates a solid foundation both for future monographic studies in this field and for the study of contemporary Azerbaijani poetry in an international context.

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DOI https://doi.org/10.30525/2592-8813-2026-2-65

THE PROBLEM OF SOCIAL ENVIRONMENT AND INDIVIDUAL FREEDOM IN AZIZAH JAFARZADEH'S "ZARRINTAJ-TAHIRA" AND DORIS LESSING'S "THE GOLDEN NOTEBOOK"

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Abstract. In contemporary literary studies, the relationship between the individual and society, as well as the influence of the social environment on a person's worldview and life position, is regarded as one of the most significant research areas. This article examines the problem of social environment and individual freedom in the works of the prominent Azerbaijani writer, People's Writer and Professor Azizah Jafarzadeh, and the Nobel Prize laureate and one of the most distinguished representatives of English prose, Doris May Lessing, particularly in her novel *The Golden Notebook*. In both works, the relationship between the individual and society, as well as the impact of the social environment on a person's worldview and social position, is analyzed. In Azizah Jafarzadeh's historical novel *Zarrintaj-Tahira*, the struggle of a woman against religious and social restrictions and her determination to achieve spiritual freedom are depicted. In Doris Lessing's *The Golden Notebook*, the influence of the social environment and political ideologies on individual behavior in modern Western society is presented. Furthermore, the impact of radical ideas on the protagonist's life is artistically illustrated. The study concludes that although the idea of individual freedom is presented within different social and cultural contexts in these novels, both authors approach the relationship between society and the individual from a critical perspective.

Key words: historical novel, political novel, individual freedom, female character, feminism.

Introduction. It is well known that the relationship between the individual and society, as well as the influence of the social environment on a person's worldview and individual position, constitutes an important area of research across different cultural and literary contexts. A comparative analysis of the artistic representation of this problem in diverse cultural and literary environments plays a crucial role in revealing the ideological and aesthetic characteristics of literature. In this regard, the study of the problem of social environment and individual freedom in Azizah Jafarzadeh's *Zarrintaj-Tahira* and Doris Lessing's *The Golden Notebook* is of particular importance. The research primarily employs comparative analysis and literary-theoretical methods to investigate the issue.

Discussion. One of the works in 20th-century Azerbaijani literature that portrays characters devoted to the ideal of freedom as central figures is the novel *Zarrintaj-Tahira* by the People's Writer Azizah Jafarzadeh. The work is dedicated to Tahira Qurratulayn, a poet and a revolutionary woman who was active in the first half of the 19th century in the territory of present-day Iran and became an unwavering advocate of women's freedom in the East. The novel was first published in 1994 in the journal *Azerbaijan* under the title *Zarrintaj*. Holding a special place in Jafarzadeh's historical prose, *Zarrintaj-Tahira* is of significant value in Azerbaijani literature as a representation of personal freedom and the promotion of independence.

In writing the novel, the author made extensive use of various historical and literary sources, including *Early History of Tahere Life*, Alakbar Mushir Salim's *Zanani-Sukhanvar*, Aliakbar Dehkhoda's *Loghatnameh*, Fakhri Qumi's *Zanani-Mashhuri-Iran*, Yahya Aryanpur's *Az Saba ta Nima*, Molla Huseyn Bashiriyya's *Nasekhut-Tavarikh*, Mirza Kazim Bey's *Bab and the Babis*, Atrep's *Babism and Baha'ism*, M.S. Ivanov's *Babid Uprisings in Iran* and *Essays on the History of Iran*, Belyayev's *Muslim Sectarianism*, A. Massé's *Islam*, Maqsud Hajiyev's *Five Years in a Neighboring Land*, G. Karimov's *Sharia and Its Social Essence*, Mohammadhasan Khan Maraghayi's *Al-Maasir val Asar*, and M.F. Akhundov's *Letters of Kamaluddovla*.

In the section titled "My Preface," the author notes that she relied on a wide range of materials, documents, essays, and articles in writing the novel. By portraying the historical figure Tahira Qurratulayn, she highlights the issue of women's welfare and freedom in the East during the first half of the 19th century, presenting Tahira as a symbol of women's liberation. Although the theme of the novel is derived from theological discourse, the author's primary aim was not to depict the struggle of Babism against Islam or Shiism. It is well known that in the 20th century, the Soviet Union's policy toward women had a dual character: on the one hand, it promoted equal rights and opportunities, while on the other hand, this policy often remained episodic in practice. Despite various measures, traditional attitudes toward women persisted. From a retrospective perspective, despite constitutional principles and legal frameworks, genuine gender equality was not achieved in the former USSR. One of the main reasons was the lack of support for these legal provisions within public opinion.

Researcher Yavuz Akhundov notes: "Depicting a historical figure within the context of the socio-political events of their time, as well as the national liberation movement of the people to which they belong, allows for a broader, more multifaceted, and vivid representation of the character" (Axundov, 1988, p. 87). In the novel, Azizah Jafarzadeh portrays the female protagonist Tahira Qurratulayn as a symbol of freedom, independence, and equality.

In the section of the novel titled *"Babis,"* the power and authority of Babi Sahib–az-Zaman are discussed. The scenes presented by the author demonstrate that ordinary people gathered in the marketplace engage in discussions about this religious movement, reflecting on it through concepts preserved in the collective memory of history. It becomes evident that young adherents of the Babi movement actively promote its teachings and interpret its essence. In the *"Babis"* section, reference is also made to the resistance movement of Imam Shamil and the creative ideals of the poet Nabati. In the section titled *"The Second Front,"* the author emphasizes the importance of the struggle for freedom and highlights the intellectual trajectory of those engaged in this cause. Observing the lack of organization and internal unity among the younger generation of that period, the writer implicitly refers to events taking place in Northern Azerbaijan. In the passages depicting conversations among local inhabitants, the following is noted:

"What is this? Poor, simple villagers returning from the summer pastures saw that their homeland – the most fertile, well-watered lands – had been filled with Armenians brought from Iran and Turkey. It is the policy of Russia… The people were left helpless. They knew neither the Armenian language nor Russian. To whom could they complain? Where could they turn? Thus, they turned toward Iran, already burdened with countless troubles…" (Jafarzadeh, 2023, pp. 20–21). In the section titled *"Husband,"* Tahira's inclination toward the Babi movement and her admiration for the Bab become evident during her conversation with her husband, Molla Mohammad. Upon seeing his wife's poem, Molla Mohammad is horrified:

"What is this? What does it mean?
The dust of your doorstep is my Kaaba,
Your face illuminates the world.
The bow of your eyebrow is my qibla,
Your hair is the chain that burns me." (Jafarzadeh, 2023, pp. 20–21)

In the novel, during a dialogue with Molla Saleh, Zarrintaj expresses a remarkable idea: "We have a beautiful language – sweet as honey, pure as spring water, as clear as tears… Why is it that in madrasas the works of poets like Fuzuli are not taught, while Hafez and Saadi are? Why not Fuzuli or Saib Tabrizi? You are the spiritual fathers of the people – why do you allow our language and national identity to disappear?" (Jafarzadeh, 2023, pp. 20–21)

Azizah Jafarzadeh does not explicitly present Babism as an entirely reactionary movement; however, she criticizes the harsh persecution of its followers. In the section titled *"Zarrintaj, Zahra, Fatima, Zakiyya, Qurratulayn,"* Zarrintaj raises the issue of individual freedom. Her speech, which

highlights the strength of women in society, is one of the most powerful moments in the novel: "Hazrat Qa'im himself stated in his *Bayan* that God created men and women equal, with the same rights. Is it then right to keep women eternally imprisoned in the veil? Of course not. A woman is the continuation of humanity, the mother of future generations." (Jafarzadeh, 2023, pp. 20–21)

Zarrintaj stands in opposition to the immanent norms and constraints of her time. Commenting on the support for Tahira Qurratulayn, Mirza Kazim Bey, interpreting the views of the Iranian historian Sepehr, writes: "The historian attempts to explain it as follows: the daughter of the Mujtahid of Qazvin was exceptionally educated – even a scholar – with excellent oratory skills, and at the peak of all these qualities was her incomparable beauty. For this reason, the historian claims, she managed to surround herself with a crowd of admirers. However, such an extraordinary phenomenon could only be described in this way by a biased Muslim observer. What is overlooked is that this 'crowd of admirers' was under the woman's spiritual influence…" (Kazim Bey, 2018, p. 183) With the novel *Zarrintaj-Tahira*, the writer Azizah Jafarzadeh demonstrates that when the fate of an individual and that of a nation are perceived and articulated as a unified problem, regardless of time and place, what emerges is "great literature." In the author's wise prose, the people themselves are presented as the true subject and driving force of literature, embodying both the aesthetic potential and the objective social forces that shape historical development. A prominent figure in English literature, Doris Lessing began her literary career in the 1930s. In her works, she consistently reflected Eastern literary, artistic, and philosophical traditions, often influenced by Sufism. Later, she turned to new thematic directions in her fiction. In the second half of the twentieth century, Lessing produced a wide range of works in various genres, including novels, short stories, science fiction, autobiography, drama, poetry, and essays, many of which carried a strong spirit of intellectual and social critique. Among her most notable novels are The Golden Notebook, The Summer Before the Dark, and Memoirs of a Survivor. Lessing was shortlisted for the Booker Prize three times and received critical acclaim for works such as Briefing for a Descent into Hell (1971), The Making of the Representative for Planet 8 (1981), and The Good Terrorist (1985). She was awarded the Nobel Prize in Literature for her psychological novel The Golden Notebook. Although feminist perspectives occupy an important place in her work, the author herself never explicitly identified as a feminist writer.

The Golden Notebook, which holds a special place in Lessing's творчество, was written during the 1950s and 1960s. Composed while the author was living in London, the novel was published in 1962 and is regarded as one of the notable examples of postmodern literature. The narrative is primarily set in London, while also depicting events in colonial Africa. The novel's structural fragmentation – dividing life into different phases – as well as its exploration of social disintegration and the tensions between communist and anti-communist ideologies, are of particular interest.

In the preface to the novel, the author writes: "It is not possible for reviewers and critics to provide what they purport to provide... always in terms of comparison, at success, and of failure." (Lessing, 2007, p. 15). In this passage, the author criticizes the early inculcation of meaningless comparisons within society and draws attention to their detrimental effects, thereby enhancing the social significance of the work. In *The Golden Notebook*, Doris Lessing portrays the life, memories, and written records of Anna Wulf, a young writer and activist woman living in the 1950s, both in London and within the colonial context of Africa. Considered innovative in both form and content, the novel was described as a manifesto of feminism following its publication. It represents a monumental achievement not only in Lessing's творчество but also in twentieth-century literature.

The novel consists of a section titled *"Free Women"*, which narrates the lives of Anna and her friend Molly, as well as four personal notebooks kept by Anna. The "Black Notebook" records the traumatic experiences she encountered in Africa; the "Red Notebook" reflects her reluctant candidacy for the Communist Party of Great Britain and her subsequent rejection of it; the "Yellow Notebook," through the story titled *"The Shadow of the Third,"* portrays Ella's confrontation with the pressures

imposed by arrogant men. This section begins as the manuscript of a novel inspired by Anna's own life, depicting the contradictory relationship between Ella and Paul and culminating in Ella's disappointment. The "Blue Notebook," on the other hand, consists of personal diaries reflecting insecurity and inner conflict, including Anna's sessions with her psychoanalyst, Mrs. Marks. Ultimately, Anna brings together her thoughts in the "Golden Notebook," symbolically integrating her fragmented identity. In the novel, Anna's inability to find love and freedom leads to a profound sense of alienation within her inner world. The relationship between Anna and Saul clearly illustrates how this alienation affects her psychological state. The progression of this relationship toward madness reveals the character's internal turmoil and resistance. Critics have repeatedly engaged in polemical debates regarding whether The Golden Notebook should be classified as a modernist or postmodernist work. Anna Wulf emerges as a character constructed both autobiographically and socially in a realistic manner. At the same time, she functions as a symbolic device employed by the author to articulate psychological fragmentation and the search for individual wholeness. The black, red, yellow, and blue notebooks written by the protagonist Anna Wulf represent different fragments of a disintegrated self. As a writer, Doris Lessing expressed dissatisfaction with the tendency to interpret the novel primarily through the lens of "free women." Nevertheless, even today, women continue to evaluate The Golden Notebook as a work that rejects dependency and emphasizes the importance of responsibility and self-determination. This novel, which incorporates elements drawn from life experiences, is considered one of Lessing's highest artistic achievements. *The Golden Notebook* affirms, above all, the idea that individuals are reflections of one another.

Conclusion. In twentieth-century Azerbaijani literature, the character of Tahira Qurratulayn created by Azizah Jafarzadeh, and in English literature, the character of Anna Wulf created by Doris Lessing, share a number of significant similarities. Both figures are writers who demonstrate resilience and determination in confronting the severe challenges imposed by society, particularly as women. The foresight of both characters, their endurance despite difficulties in family relationships, and their role as sources of support for other women provide a strong basis for comparative analysis. As one of the novels dedicated to the aspirations and ideals of women, *Zarrintaj–Tahirə* by Azizah Jafarzadeh was widely acclaimed within the literary sphere. Similarly, Doris Lessing's experimental novel The Golden Notebook, which opened new horizons in both form and content, was described as a feminist manifesto upon its publication. However, beyond this label, the novel holds particular significance for its critical exploration of the protagonist's life, its condemnation of imperialist traditions in European history, and its exposure of existing social limitations. The novel stands as one of the monumental literary achievements of the second half of the twentieth century and represents an important source in the history of feminist thought. In both works, themes such as female identity, inner psychological turmoil, the fate of women writers, ideology, political engagement, and disillusionment emerge as shared and central elements.

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Baltic Journal of Legal and Social Sciences. Number 2 (2026).
Publicētie materiāli ne vienmēr atbilst redakcijas viedoklim.
Par skaitļu, faktu pareizību un sludinājumiem atbild autori.

Izdevniecība “Baltija Publishing”
Valdeku iela 62-156, Riga, LV-1058
Iespiests tipogrāfijā SIA “Izdevniecība “Baltija Publishing”