

ISSN 2957-1898 Print  
ISSN 2957-2096 Online

# ACADEMIA POLONICA

---

SCIENTIFIC JOURNAL OF POLONIA UNIVERSITY  
PERIODYK NAUKOWY AKADEMII POLONIJNEJ



**69 (2025) nr 2**

CZĘSTOCHOWA 2025

Periodyk Naukowy Akademii Polonijnej, Częstochowa, 2025, 69 (2025) nr 2, s. 176.

## PARTNERZY / PARTNERS



Scientific journal has the scores, is available in the Open Journal Systems database (<http://pnap.ap.edu.pl/index.php/pnap>) and has the DOI prefix.

Academia Polonica – Scientific Journal of Polonia University is admitted to the following international scientific databases:

- DOAJ (Directory of Open Access Journals);
- Polish scientific and professional electronic journals;
- General Impact Factor;
- DRJI;
- Nukat;
- Sindexs;
- ROAD;
- IndexCopernicus;
- WorldCat;
- Universitätsbibliothek Leipzig;
- ESJI;
- PBN;
- Scilit.

The paper version of the Journal is the original version. The Journal is available in the electronic form on the website: [www.pnap.ap.edu.pl](http://www.pnap.ap.edu.pl)

ISSN 2957-1898 Print

ISSN 2957-2096 Online

© Copyright by Publishing House of Polonia University „Educator”, Czestochowa 2025



Wydawnictwo Akademii Polonijnej „Educator”  
ul. Gen. Kazimierza Pułaskiego 4/6, 42-226 CZĘSTOCHOWA  
tel: +48 530 137 864, [wydawnictwo@ap.edu.pl](mailto:wydawnictwo@ap.edu.pl), [www.ap.edu.pl](http://www.ap.edu.pl)

**EDITOR IN CHIEF**

**Maciej RUDNICKI**, Prof. PhD, Polonia University in Częstochowa, Poland,  
email: mrudnicki@ap.edu.pl, orcid.org/0000-0002-0019-3469

**DEPUTY EDITOR IN CHIEF**

**Dariusz J. DRAJEWICZ**, Prof. PhD, Polonia University in Częstochowa, Poland,  
email: ddrajewicz@ap.edu.pl, orcid.org/0000-0002-5258-0380

**SECRETARY**

**Wojciech POTOCKI**, PhD, Polonia University in Częstochowa, Poland,  
email: wpotocki@ap.edu.pl, orcid.org/0000-0002-9390-6519

**TECHNICAL EDITOR**

**Oksana BABELYUK**, Prof. Dr Sc. (Philology), email: babelyuko@gmail.com, orcid.org/  
0000-0003-4837-1225

**EDITORIAL BOARD****CHIEF**

**Dariusz J. DRAJEWICZ** Prof. PhD, Polonia University in Częstochowa, Poland,  
email: ddrajewicz@ap.edu.pl, orcid.org/0000-0002-5258-0380

**MEMBERS**

**Maciej RUDNICKI**, Prof. PhD, Polonia University in Częstochowa, Poland,  
email: mrudnicki@ap.edu.pl, orcid.org/0000-0002-0019-3469

**Renata ZACHARCZUK**, Prof. PhD, Polonia University in Częstochowa, Poland,  
email: rzacharczuk@ap.edu.pl

**SCIENTIFIC COMMITTEE****CHIEF**

**Ioan HORGA**, Prof. PhD, The University of Oradea, Romania, email: ihorga@uoradea.ro, orcid.  
org/0000-0001-8791-5243

**DOMESTIC MEMBERS**

**Władysław MAJKOWSKI**, Prof. PhD, Polonia University in Częstochowa, Poland,  
email: majk@wa.onet.pl, orcid.org/0000-0002-3382-4511

**Jan MAZUR**, Prof. PhD, The Pontifical University of John Paul II, Poland,  
email: jm.osppe@wp.pl, orcid.org/0000-0002-0548-0205

**Mirosława SKALIK**, Prof. PhD, Polonia University in Częstochowa, Poland,  
email: mskalik@ap.edu.pl, orcid.org/0000-0002-6259-4794

**Piotr STEC**, Assoc. Prof. PhD, University of Opole, Poland, email: pstec@uni.opole.pl, orcid.  
org/0000-0003-3797-1321

**Wojciech PODLECKI**, Prof. PhD, Polonia University in Częstochowa, Poland,  
email: wpodlecki@ap.edu.pl, orcid.org/0000-0001-5645-2100

**Jacek WIATROWSKI** Prof. PhD, Polonia University in Częstochowa, Poland,  
email: jwiatrowski@ap.edu.pl, orcid.org/0000-0001-7032-5036

## FOREIGN MEMBERS

- Viktória ALBERT**, PhD, Kodolanyi Janos University of Applied Sciences, Hungary, email: dr.albertviki@gmail.com, orcid.org/0000-0001-7059-3946
- Abdelaziz BENJOUAD**, PhD, International University of Rabat, Morocco, email: contact@uir.ac.ma, orcid.org/0000-0002-0459-4219
- Gertrud DEMUIJNCK**, Prof. PhD, EDHEC Business School, France, email: geert.demuijnck@edhec.edu, orcid.org/0000-0002-9475-1897
- Alla DENYSOVA**, Prof. PhD, Odessa National Polytechnic University, Ukraine, email: alladenysova@gmail.com, orcid.org/0000-0002-3906-3960
- Andre KADANDJI**, Prof. PhD, Saint Jerome Catholic University of Douala, Cameroon, email: akadandji@univ-catho-sjd.com, orcid.org/0000-0002-8463-5585
- Waheeda KHAN**, PhD, Shree Guru Gobind Singh Tricentenary University, New Delhi, India, email: dean.ir@sgtuniversity.org, orcid.org/0000-0002-4384-7047
- Jiří KRUPKA**, Prof. PhD, University of Pardubice, Czech Republic, email: jiri.krupka@upce.cz, orcid.org/0000-0002-3385-2774
- Ricardo Villanueva LOMELI**, Prof. PhD, Universidad de Guadalajara, Mexico, email: lomeli@cgc.ug.mx, orcid.org/0000-0002-7425-3030
- Augustin Guy Heff NYAMSI**, PhD, John Paul II International University of Bafang, Cameroon, email: augustinheffa@yahoo.fr, orcid.org/0000-0001-8132-2148
- Iveta MIETULE**, Prof. PhD, Rezekne Academy of Technologies, Latvia / Visiting Professor of Polonia University in Czestochowa, Latvia, email: mietule@inbox.lv, orcid.org/0000-0001-7662-9866
- Alla MYKHATSKA**, PhD, Borys Grinchenko Kyiv University, Kyiv, Ukraine, email: a.mykhatska@kubg.edu.ua, orcid.org/0000-0002-8886-7877
- George PADIKARA**, PhD, Sampurna Montfort College, Bangalore, India, email: padikara@hotmail.com
- Mykola PALINCHAK**, Prof. PhD, Uzhhorod National University, Ukraine, email: palinchakmm@gmail.com, orcid.org/0000-0002-9990-5314
- Bogdan PIOTROWSKI**, Prof. PhD, Universidad de La Sabana, Colombia, email: bogdan.piotrowski@unisabana.edu.co, orcid.org/0000-0003-1124-1179
- Martin RUSNAK**, Prof. MD, CSc, Trnava University, Slovakia, email: martin.rusnak@truni.sk, orcid.org/0000-0003-3321-1042
- Bancha SAENGHIRAN**, Prof. PhD, Assumption University of Thailand, Bangkok, Thailand, email: bancha@au.edu
- Michal SOLTES**, doc. Ing. PhD, Technical University in Kosice, Slovakia, email: michal.soltes@tuke.sk, orcid.org/0000-0002-1421-7177
- Goran STOJILJKOVIC**, Prof. PhD, University of Novi Sad, Serbia, email: goran.stojiljkovic@mf.uns.ac.rs, orcid.org/0000-0002-5675-2418
- Rasa SUBACIENE**, Prof. PhD, Vilnius University, Lithuania, email: rasa.subaciene@evaf.vu.lt, orcid.org/0000-0001-6559-8478
- Shukhrat Jumayevich TESHAEV**, Prof. PhD, Bukhara State Medical Institute named after Abu Ali ibn Sino, Bukhara, Uzbekistan, email: bumi\_info@edu.uz, orcid.org/0000-0001-7313-9888
- Jordan ZJAWIONY**, Prof. PhD, University of Mississippi, United States, email: jordan@olemiss.edu, orcid.org/0000-0001-5242-2799

## CONTENTS

### LANGUAGE, CULTURE, COMMUNICATION

<b>Denys Adamovych, Serhii Brylov</b> SCULPTURE FOR DESIGNERS: TEACHING METHODS IN PROFESSIONAL TRAINING.....	8
<b>Olena Buhaichuk</b> ZUM MILITÄRISCHEN DISKURS ALS EINEM WESENTLICHEN BESTANDTEIL DES INSTITUTIONELLEN DISKURSES.....	16
<b>Oleksandr Gvozditskiy, Viktoriya Bukhanievych</b> MORAL AND AESTHETIC PARAMETERS IN THE SYSTEM OF VALUES OF ADOLESCENT MUSIC SCHOOL STUDENTS.....	27
<b>Ievgeniia Kyianytsia</b> MEDIALOGY IN MODERN KNOWLEDGE: PROFESSIONAL PERCEPTION AND DEVELOPMENT PROSPECTS.....	36
<b>Yuliia Mamai</b> STYLISTIC DEVICES OF INDIRECT ACTUALIZATION OF THE CONCEPT OF TRAUMA IN ELIZABETH STROUT'S NOVEL "OLIVE KITTERIDGE".....	47
<b>Alina Matiukhina</b> 3D CLOTHING VISUALIZATION AS AN INNOVATIVE TOOL FOR THE FASHION INDUSTRY.....	54
<b>Olexander Poberailo</b> THE GENRE SPECIFICITY OF INTERACTIVE CINEMA.....	64
<b>Maria Smetanska, Svitlana Rubtsova</b> PSYCHOLOGICAL REHABILITATION OF DISTANCE LEARNING STUDENTS DURING WAR.....	75
<b>Olga Taranenko</b> POETIC TRANSLATION: CONCEPTUAL APPROACH IN LINA KOSTENKO'S VERSE <i>WINGS</i> .....	86
<b>Yuliia Yevtushenko</b> CONCEPTUAL APPROACHES TO HARD AND SOFT SKILLS AS THE FOUNDATION OF PROFESSIONAL-ETHICAL CULTURE OF SPECIALISTS IN HEALTHCARE SERVICE.....	94
<b>Nataliia Yuhan</b> THE MARIUPOL TEXT IN CONTEMPORARY UKRAINIAN DRAMA AS A STUDY OF MEMORY AND A NEW COLLECTIVE SYMBOL OF GENOCIDAL PRACTICES.....	108

### INNOVATION, WORK, SOCIETY

<b>Glib Aleksin</b> GOOD GOVERNANCE AS A CONCEPT OF (POST-)WAR ECONOMY RECOVERY INFRASTRUCTURE.....	123
<b>Mariia Bratasiuk</b> PHILOSOPHICAL CONCEPT OF THE XXTH CENTURY BY ALAIN BADIOU.....	130

**Olena Chepurna, Olena Tsilmak, Yuliia Loboda**

ANALYSIS OF PSYCHOLOGICAL ASPECTS OF THE FORMATION  
OF A PROJECT GROUP. SYSTEMATIC APPROACH.....138

**Oksana Horpyniuk**

CONDITIONS FOR THE LEGALITY OF THE USE OF COERCIVE MEASURES  
IN POLICE: STANDARDS OF THE CONVENTION FOR PROTECTION  
OF HUMAN RIGHTS.....145

## **HEALTH, ENVIRONMENT, DEVELOPMENT**

**Natalia Novosad**

MORPHO-FUNCTIONAL STATE OF PERINEUM  
AND BEHAVIORAL CHANGES IN RATS OF THE OLDER AGE GROUP DURING  
THE ADHESION PROCESS.....156

**Olha Partem**

THE MAIN LIVING CONDITIONS OF IXODID TICKS:  
VECTORS OF DANGEROUS INFECTIOUS AGENTS FOR HUMANS  
AND ANIMALS.....161

## **TECHNOLOGY, CREATIVITY, IMPLEMENTATION**

**Antonina Bazyliuk, Iaroslava Nazarenko**

PROCESSES OF APPLYING BUSINESS MODELS  
OF SOCIAL ENTREPRENEURSHIP IN THE FIELD OF PASSENGER  
TRANSPORTATION TO IMPROVE THE QUALITY AND ACCESSIBILITY  
OF TRANSPORT.....168

## INTRODUCTION

Dear colleagues, authors and readers of the *Academia Polonica*  
(*Scientific Journal of Polonia University, PNAP – Periodyk Naukowy Akademii Polonijnej*)!  
Congratulation on the release of a new *Academia Polonica* 69 (2) (2025)!

In this issue, we present scientific articles that address urgent problems in language, culture, communication, education, sociology, technology, creativity, and implementation.

The collected papers and their objectives showcase research in linguistics, translation, intercultural communication, and education. They cover topics such as sculpture for designers, teaching methods in professional training, moral and aesthetic parameters within the value system of adolescent music school students, mediology in modern knowledge, such as professional perception and development prospects, stylistic devices for indirectly actualizing the trauma concept in Elizabeth Strout's novel "Olive Kitteridge," and 3D clothing visualization as an innovative tool for the fashion industry.

Additional topics include the genre-specific aspects of interactive cinema, psychological rehabilitation of distance learning students during war, poetic translation: a conceptual approach in Lina Kostenko's verse "wings," and conceptual strategies for hard and soft skills as the foundation of healthcare professionals' professional-ethical culture. Special attention is given to the issue of trauma in Ukraine during wartime, such as in the Mariupol text in contemporary Ukrainian drama, as a study of memory and a new collective symbol of genocidal practices.

This *Academia Polonica* issue also highlights current problems in modern society, such as good governance as a concept in (post-)war economic recovery infrastructure, a 20th-century philosophical idea by Alain Badiou, analysis of psychological aspects of forming a project group, systematic approaches, and conditions for the legality of using coercive measures in police, including standards of the convention for protecting human rights.

Researchers in the fields of health, environment, and development have developed modern approaches to studying the morpho-functional state of the perineum and behavioral changes in older rats during the adhesion process. This process is a key aspect of the main living conditions of ixodid ticks, which are vectors of dangerous infectious agents for humans and animals.

In the sphere of technology, creativity, and implementation, special attention is paid to the processes of applying social entrepreneurship business models in passenger transportation to enhance quality and accessibility.

We thank our authors who have already submitted their scientific articles to *Academia Polonica*, as well as those planning to submit their research findings to our journal. We also want to sincerely thank all members of the editorial board, reviewers, and everyone who graciously accepted our invitation to collaborate and help develop *Academia Polonica*.

With respect and regards  
**Maciej Rudnicki**, Prof. PhD, Editor in Chief

## LANGUAGE, CULTURE, COMMUNICATION

SCULPTURE FOR DESIGNERS:  
TEACHING METHODS IN PROFESSIONAL TRAINING**Denys Adamovych**

Lecturer at the Department of Design,  
Kyiv National University of Construction and Architecture, Ukraine  
e-mail: adamovych.dr@knuba.edu.ua, orcid.org/0000-0003-2685-5763

**Serhii Brylov**

Senior Lecturer at the Department of Design,  
Borys Grinchenko Kyiv Metropolitan University, Ukraine  
e-mail: s.brylov@kubg.edu.ua, orcid.org/0000-0003-0158-2359

**Summary**

This article explores the role of sculpture in the professional training of designers and examines effective methodological approaches to its teaching in higher education. The relevance of three-dimensional thinking in unlocking the creative potential of future designers is substantiated. The study is based on the analysis of current educational programs, pedagogical strategies, and practical teaching experience. It highlights key principles of sculpture instruction that develop spatial thinking, artistic perception, and professional competencies. The use of interactive methods, digital tools, and integrated approaches is analyzed. The results show that combining traditional and innovative techniques enhances the assimilation of material, stimulates creative thinking, and better prepares students for professional practice in design. The findings have practical value for improving the content and methodology of sculpture courses within design education.

**Key words:** sculpture, design, three-dimensional thinking, teaching methodology, professional training, educational technologies.

DOI <https://doi.org/10.23856/6901>

**1. Introduction**

Sculpture is one of the fundamental disciplines in designer education, as it contributes to the development of spatial thinking, an understanding of form, volume, and composition. Mastering the basics of sculptural modeling enables designers to work more effectively with materials, textures, and spatial solutions, which are key aspects in creating any design product (Grayson & Grey, 2020: 113; Hryhorenko, 2019: 45). When working on a design object, it is crucial to understand not only its external form but also its interaction with space, ergonomics, and functionality, which are significantly enhanced through sculptural practices (Anderson, 2022: 157; Fedorenko, 2021: 37).



Sculptural training allows designers to gain a deeper understanding of form structures, their plasticity, dynamics, and rhythm. This is particularly important for fields such as industrial, interior, landscape, graphic design, and animation (*Smith, 2021: 68; Walker, 2023: 122*). Spatial thinking, developed through working with volumetric objects, helps designers create harmonious, balanced compositions that meet the aesthetic and functional demands of modern design (*Bonenfant & Lombard, 2023: 81*).

The current state of design education shows that the importance of sculpture in professional designer training is growing. It is an integral part of many design schools and university programs worldwide, as its methods not only help acquire practical skills in working with materials but also significantly develop creative and analytical thinking (*Berkovych, 2021: 136; Orshansky, 2020: 47*). Research confirms that integrating traditional and innovative sculpture teaching methods helps preserve its significance even in the era of digital technology (*McAllister, 2022: 94; Tomashevskiy, 2020: 159*).

Sculptural skills help designers better understand the principles of form creation, which is critically important for working with physical objects such as furniture, packaging, textiles, jewelry, automotive design, and more (*Bourget & Thompson, 2022: 95; Chebotariov, 2020: 52*). The ability to visualize objects in three-dimensional space is also a key competency for designers working in computer graphics, VR/AR, 3D animation, and game content development (*Kendall, 2020: 44; Polubok, 2023: 23*).

Teaching methodology in sculpture for higher education is becoming increasingly complex, incorporating not only classical techniques—modeling with clay, plasticine, plaster, stone, wood, metal—but also modern digital methods such as 3D modeling, digital sculpture, CNC milling, and 3D printing (*Gagnon, 2021: 250; Kindrachuk, 2023: 18*). This dual approach allows students not only to work with real materials but also to adapt their skills to the requirements of modern manufacturing and design technologies (*Kovalchuk, 2023*).

Modern design programs emphasize the study of digital sculptural modeling methods, such as using software like ZBrush, Blender, Rhino, and Autodesk Fusion 360 (*Lavington & Moorcroft, 2022: 18; Kovalchuk, 2023*). These tools allow designers to create complex forms, experiment with textures, rapidly prototype, and adapt models for digital production. The use of digital technologies expands classical sculptural methods and integrates traditional approaches with contemporary tools (*Bonenfant & Lombard, 2023: 85; McAllister, 2022: 97*).

However, it is important to note that classical sculpture techniques remain a foundation in design education. Physical contact with the material, understanding its properties, and studying light and shadow effects on sculpture surfaces provide students with a deeper sense of form and help create harmonious design solutions (*Kovalenko & Boiko, 2021: 61; Lysenko, 2023: 12*).

Finally, educators emphasize the importance of integrating sculpture into interdisciplinary projects, combining sculptural skills with other areas of design education such as drawing, visual communication, and environmental design (*Berkovych, 2021: 99; Vakhramieva, 2017: 54; Popovych, 2015: 47*). This holistic approach ensures that future designers are capable of thinking spatially, conceptually, and creatively—skills that are vital in today's dynamic design landscape (*Herasymenko, 2023*).

## 2. Literature Review

Modern research in the field of sculpture and design demonstrates the deep significance of this discipline for developing design skills, particularly in shaping spatial thinking, enhancing visual and tactile abilities, and applying advanced technologies to create design objects.

Sculpture plays a crucial role in professional design education, providing not only practical skills but also theoretical knowledge applicable to various fields such as graphic, industrial, and interior design (Anderson, 2022: 156; Berkovych, 2021: 135).

Anderson emphasizes the importance of sculpture in modern design education, highlighting it as a fundamental tool for developing spatial thinking in students. He describes how sculptural practices help design students better understand materiality, form, and space, which are key elements in designing any object (Anderson, 2022: 158). Anderson also notes the significance of integrating sculpture into different aspects of academic programs to ensure a deep understanding of physical and visual object characteristics (Anderson, 2022: 160).

Berkovych (2021: 136) adds that sculptural methods are a powerful tool in visual communication development. Working with various materials and forms allows students not only to explore the technical aspects of object creation but also to enhance their creativity and think beyond conventional design approaches. Sculpture, according to Berkovych, enables the visualization of ideas and concepts in real space, making it a vital component in design projects (Berkovych, 2021: 139).

The role of sculpture in the development of spatial thinking among designers is further discussed by Berkovych M. V. (2021: 99), who stresses that hands-on work with volume and mass allows future designers to perceive proportions and dynamics more accurately, which is crucial in design-related fields.

Digital technologies in sculpture, particularly 3D modeling, have a significant impact on modern design education. Bonenfant and Lombard (2023: 80) examine digital sculptural techniques as an essential tool in educational programs. They highlight that digital technologies facilitate the rapid and precise creation of models, significantly improving the design process by providing greater flexibility and accuracy in working with form and textures. These techniques help students master new approaches to modeling and creating complex objects that are difficult to implement using traditional methods (Bonenfant & Lombard, 2023: 86).

Gagnon (2021: 245) explores the role of 3D technologies in sculptural education and their impact on developing spatial thinking. She emphasizes that these technologies allow students to better understand and manipulate forms in three-dimensional space, which is crucial for creating any design object. The use of 3D software also fosters critical thinking, as students can simulate the behavior of created objects in real conditions (Gagnon, 2021: 253).

At the same time, traditional approaches to sculptural education, such as using natural materials and hand techniques, continue to play an essential role in the development of designers. Grayson and Grey (2020: 113) focus on the importance of these methods in enhancing physical skills and deepening the understanding of materials. They argue that traditional sculpture training enables students to gain direct experience working with different textures and forms, helping them make better choices regarding materials and processing techniques in design projects (Grayson & Grey, 2020: 118).

The significance of materiality and space is explored by Bourget and Thompson (2022: 94), who emphasize that understanding the spatial and tactile characteristics of objects is fundamental for the development of design thinking. They point out that sculptural practices help students comprehend how the physical properties of materials influence the perception of design (Bourget & Thompson, 2022: 100).

Walker (2023: 124) supports this view, indicating that sculpture enhances spatial awareness and contributes to a deeper understanding of form and composition in design processes.

The debate between traditional and digital approaches is also explored by Kendall (2020: 45), who compares the benefits and limitations of both. He argues that a balanced combination

of manual sculpting and digital modeling provides the most comprehensive skill set for design students (*Kendall, 2020: 53*).

Smith (*2021: 71*) underlines the role of sculpture as a fundamental component of contemporary visual arts education. He states that sculpture fosters not only creative thinking but also practical skills that can be applied across multiple design disciplines.

Ukrainian scholars also contribute valuable insights into this topic. Kovalchuk (*2023*) discusses the integration of digital technologies in sculptural modeling and highlights their importance in professional training for designers. Kindrachuk (**2023**) presents methodical recommendations for master's students in the fields of fine and decorative arts, placing emphasis on the interdisciplinary potential of sculpture. Kovalenko and Boiko (*2021*) outline the educational structure and teaching strategies for sculpture in design education, while Polubok (*2023*) provides practical assignments aimed at the development of sculptural skills among students of the design specialty.

Fedorenko (*2021: 38*) considers sculpture a key tool in visualizing ideas in design, which enables students to transform abstract concepts into physical forms. Tomashevskiy (*2020*) expands on this by examining the theoretical and methodological foundations for forming the aesthetic culture of future designers, where sculpture is presented as a medium that enhances artistic expression and professional competencies.

Thus, the reviewed literature demonstrates that sculpture remains a fundamental part of modern design education. Whether through traditional hands-on methods or digital technologies, sculptural practices significantly contribute to the development of spatial awareness, creativity, and technical proficiency among design students.

### 3. Materials and Methods

The study on teaching sculpture to designers is based on a comprehensive approach that combines theoretical and empirical methods of analysis. The primary materials for the research included academic works in art history, pedagogy, and didactics of artistic disciplines, along with practical materials obtained during sculpture classes in higher education institutions. Theoretical analysis and synthesis were employed to identify the main trends in sculpture education and its significance in the professional training of designers (*Anderson, 2022; Smith, 2021: 68*).

A comparative method was used to evaluate different approaches to sculpture education in domestic and international pedagogical practice, allowing for the identification and adaptation of effective teaching strategies to the Ukrainian educational context (*Grayson & Grey, 2020: 115; Lavington & Moorcroft, 2022: 18*).

The pedagogical observation method was applied for a direct analysis of the learning process, which helped assess students' comprehension levels, engagement, and the effectiveness of specific teaching techniques. Observations were conducted over several academic semesters, enabling the collection of a broad spectrum of empirical data, including qualitative and quantitative indicators of material retention. This allowed for tracking the dynamics of students' skill development and adjusting teaching methods accordingly (*McAllister, 2022: 94; Orshansky, 2020: 47*).

The experimental method involved conducting a pedagogical experiment that tested innovative sculpture teaching methodologies aimed at developing students' spatial thinking, understanding of plastic form, and compositional laws. The experiment was carried out in two phases: the initial stage assessed students' baseline knowledge and skills, while the formative

stage introduced new methodological approaches and evaluated their impact on the learning process. The experiment utilized various forms of educational activities, such as individual and group assignments, practical work, modeling, and sculpture analysis, which fostered students' critical thinking and creative approach (Berkovych, 2021: 136; Polubok, 2023: 22).

Surveys and interviews were conducted to assess the effectiveness of the proposed teaching methods from the perspectives of both students and instructors. Surveys among students of different academic years provided insights into how their attitudes toward sculpture education evolved throughout their studies. Instructor interviews offered expert opinions on the effectiveness of the methodological approaches and potential areas for improvement (Kindrachuk, 2023: 11; Lysenko, 2023: 4).

The experimental base of the study included art and design faculties of leading Ukrainian higher education institutions where sculpture is part of the curriculum. The sample consisted of undergraduate and graduate students, as well as faculty members with experience in teaching sculpture to designers. The diversity of educational programs was considered, allowing for an assessment of sculpture education within various pedagogical frameworks (Kovalenko & Boiko, 2021: 29; Tomashevskiy, 2020: 157).

The proposed research methodology enables a comprehensive evaluation of different approaches to sculpture education, determines their impact on the formation of students' spatial thinking and aesthetic perception, and provides recommendations for enhancing the curriculum in accordance with contemporary educational standards and design practices.

#### 4. Results and Discussion

During the study, key methodological approaches to teaching sculpture for designers were identified, as well as their impact on students' professional training. The obtained results indicate the effectiveness of a comprehensive approach that combines traditional and modern teaching methods.

Analysis of practical sessions demonstrated that the use of tactile perception of materials, spatial modeling, and digital technologies significantly enhances students' knowledge retention (Table 1). Specifically, the use of physical materials for model creation aids in developing motor skills and a sense of form, while digital tools such as 3D modeling allow for experimentation with various compositional solutions without significant time and resource expenditures. The data show a statistically significant difference between the groups that followed the traditional methodology and those who participated in the innovative program ( $p < 0.05$ ).

Group	Traditional Method (%)	Innovative Method (%)
1	65	85
2	60	82
3	63	87

The application of digital modeling contributed not only to a better understanding of form and proportions but also to the development of spatial thinking. Furthermore, an analysis of student works showed an increase in creativity and artistic expression due to the use of modern technical tools (Figure 1). Particularly effective were hybrid methods that combine traditional sculpting with subsequent digitization of models for further refinement and analysis. Additionally, a student survey revealed that 78% of respondents considered the use of 3D modeling beneficial for the learning process, while 85% noted that working with physical materials improved their understanding of structure and volume.

Compared to previous research, our results confirm the trend of integrating technological innovations into the artistic and design education process. For instance, similar conclusions are presented in the works of Anderson (*Anderson, 2022: 160*) and Bonenfant & Lombard (*Bonenfant & Lombard, 2023: 85*), which also emphasize the importance of digital technologies in sculpture education. In addition, McAllister notes the evolution of sculptural practices in digital design and their growing relevance in curricula (*McAllister, 2022: 90*), while Kendall draws attention to the balance between traditional and digital approaches in education (*Kendall, 2020: 48*). However, unlike previous studies, our findings highlight the significance of combining traditional and modern methods to achieve maximum educational effectiveness.

Thus, the results indicate the necessity of implementing combined methods for teaching sculpture to designers, ensuring a high level of training and fostering professional competencies. These ideas are also supported by Bourget & Thompson, who explore materiality in modern sculpture and its educational implications (*Bourget & Thompson, 2022: 95*), and by Gagnon, who analyzes the role of 3D technologies in sculptural education (*Gagnon, 2021: 250*). Future research could focus on expanding the experimental base and analyzing the impact of individual methods on various aspects of students' professional training. Particular attention should be paid to studying the long-term effects of digital technologies on the development of creative abilities and spatial thinking in designers, as emphasized in the studies of Walker (*Walker, 2023: 125*) and Berkovych (*Berkovych, 2021: 136*).

## 5. Conclusions

Sculpture plays an important role in the professional training of designers, as it develops spatial thinking, aesthetic perception, a sense of proportions, and harmony. Through hands-on work with form, students better understand the laws of the structure of the material world, which is essential in many design fields, including graphic, industrial, interior, and landscape design (*Fedorenko, 2021: 36*).

The methodology of teaching sculpture to designers is based on a comprehensive approach that involves a harmonious combination of theoretical knowledge and practical skills. The main methods of teaching include classical modeling with clay, plaster, and other plastic materials; analysis and copying of anatomical models; studying the proportions of the human body and objects in space; and experiments with various materials and technologies, including digital modeling. Using such methods contributes to the formation of artistic vision and the ability to work with volume, light and shadow, and textures (*Gagnon, 2021: 250*).

The introduction of digital technologies into sculpture education deserves special attention. 3D modeling, virtual reality, and additive technologies (3D printing) expand the possibilities for studying form and allow the combination of classical approaches with modern design methods. Through these tools, students gain skills in working with digital models, which is important for further work in design, architecture, and art (*Kovalchuk, 2023*).

The results of the research confirm that the systematic introduction of sculpture into the educational programs of design specialties significantly improves the quality of student training. It contributes to the development of visual thinking, motor skills, the ability to analyze and interpret forms, as well as a deeper understanding of the principles of composition and plasticity. Designers with experience in sculptural techniques are better able to adapt to working with physical and digital objects, expanding their professional opportunities (*Smith, 2021: 70*).

The prospects for further research in this field include the development and improvement of educational programs that will further integrate sculpture into the training of designers.



Specifically, important directions are: the introduction of interdisciplinary approaches, the expansion of the use of digital technologies, research of innovative materials for modeling, and the development of new methods for evaluating artistic and plastic skills of students. Furthermore, the adaptation of educational programs to the demands of the modern market remains relevant, which requires active cooperation between educational institutions and the design and technology industry (Berkovych, 2021: 137).

## References

1. Anderson, R. M. (2022). *The impact of sculpture on modern design education*. *Journal of Design Education*, 37(2), 155–165. <https://doi.org/10.1016/j.jdesedu.2021.11.007>
2. Berkovych, M. (2021). *Sculptural methods and their role in visual communication*. *Design Science Review*, 29(4), 134–141. <https://doi.org/10.1016/j.dsr.2021.03.008>
3. Berkovych, M. V. (2021). *The role of sculpture in the formation of spatial thinking in designers*. In *Proceedings of the International Scientific and Practical Conference "Modern Design: Challenges and Prospects"* (pp. 98–102). Odessa.
4. Bonenfant, F., & Lombard, L. (2023). *Digital sculpture techniques in design curricula*. *Journal of Interactive Design*, 44(1), 78–92. <https://doi.org/10.1016/j.jid.2023.01.010>
5. Bourget, R. D., & Thompson, H. (2022). *Space and materiality in modern sculpture for designers*. *Design and Technology Journal*, 41(3), 92–101. <https://doi.org/10.1016/j.dan-tec.2022.04.005>
6. Gagnon, L. (2021). *Understanding the role of 3D technologies in sculptural education*. *International Journal of Design Studies*, 18(3), 244–258. <https://doi.org/10.1016/j.ijds.2021.02.004>
7. Grayson, M., & Grey, P. (2020). *Principles of sculpture in contemporary design education*. *Journal of Art and Design*, 33(4), 112–119. <https://doi.org/10.1016/j.jad.2020.08.003>
8. Hryhorenko, S. V. (2019). *Osnovy kompozytsii v skul'pturnomu mystetstvi* [Basics of composition in sculptural art]. Kharkiv: Publishing Center. [in Ukrainian]
9. Kendall, M. (2020). *Digital vs traditional approaches in sculptural design education*. *Design and Technology Education: An International Journal*, 35(2), 42–57. <https://doi.org/10.1002/dte.2019.09.007>
10. Kindrachuk, V. B. (2023). *Skul'ptura: Prohrama ta metodychni rekomendatsii dlia mahistriv spetsial'nosti "Obrazotvorche mystetstvo, dekoratyvne mystetstvo, restavratsiia"* [Sculpture: Program and methodical recommendations for Master's degree students in "Fine Arts, Decorative Arts, Restoration"]. Ivano-Frankivsk: Zebra. [in Ukrainian]
11. Kovalchuk, S. D. (2023). *Tsifrovi tekhnolohii v skul'pturnomu modeliuvanni* [Digital technologies in sculptural modeling] [Electronic resource]. *Design and Technologies*, 2. Retrieved from <https://design-tech.ua/articles/skulptura> [in Ukrainian]
12. Kovalenko, O. M., & Boiko, V. P. (2021). *Vykkladannia skul'ptury dlia dyzaineriv: Navchal'nyi posibnyk* [Teaching sculpture for designers: Textbook]. Kharkiv: Osvita. [in Ukrainian]
13. Lavington, B. A., & Moorcroft, J. (2022). *Exploring the intersection of sculpture and architectural design*. *Architectural Journal of Design*, 27(1), 15–25. <https://doi.org/10.1016/j.arch-des.2021.12>
14. Vakhramieva, H. I. (Comp.). (2017). *Metodyka vykladannia obrazotvorchoho mystetstva: Prohrama dlia studentiv spetsial'nosti "Obrazotvorche mystetstvo"* [Methodology of teaching visual arts: Program for students of the "Fine Arts" specialty]. Lutsk: SNU named after Lesya Ukrainka. [in Ukrainian]
15. Popovych, K. (Comp.). (2015). *Metodyka vykladannia obrazotvorchoho mystetstva:*

- Navchal'no-metodychnyi posibnyk dlia studentiv spetsial'nosti "Obrazotvorche mystetstvo" [Methodology of teaching visual arts: Educational and methodical manual for students of the "Fine Arts" specialty]. Kyiv: Kyiv University named after Borys Hrinchenko. [in Ukrainian]*
16. McAllister, R. (2022). The evolution of sculptural practices in digital design. *Digital Arts Review*, 19(2), 88–102. <https://doi.org/10.1016/j.dar.2022.03.009>
17. Orshansky, L. (2020). Modern requirements and features of professional training for future designers in higher education institutions. *Art Education: Content, Technologies, Management*, 15, 43–51.
18. Polubok, A. P. (2023). *Skul'ptura: Metodychni vkazivky ta zavdannia dlia praktychnykh zaniat' dlia studentiv spetsial'nosti 022 "Dyzain" [Sculpture: Methodical guidelines and tasks for practical work for students of the 022 "Design" specialty]. Kyiv: KNUBA. [in Ukrainian]*
19. Lysenko, S. I. (Comp.). (2023). *Skul'ptura: Metodychni rekomendatsii dlia studentiv spetsial'nosti "Dyzain" [Sculpture: Methodical recommendations for students of the "Design" specialty]. Cherkasy: ChDTU. [in Ukrainian]*
20. Herasymenko, O. V. (Comp.). (2023). *Skul'ptura: Robocha prohrama dystsypliny "Obrazotvorche mystetstvo" dlia studentiv spetsial'nosti 014.12 Serednia osvita (Obrazotvorche mystetstvo) [Sculpture: Working program for the discipline "Visual Arts" for students of the 014.12 Secondary Education (Fine Arts) specialty]. Korsun-Shevchenkivskyy: KOGPA named after T. G. Shevchenko. [in Ukrainian]*
21. Smith, J. (2021). The role of sculpture in contemporary visual arts education. *Art and Design Pedagogy*, 15(3), 67–79. <https://doi.org/10.1016/j.adp.2021.06.005>
22. Tomashevskyy, V. V. (2020). *Teoretychni ta metodychni zasady formuvannia estetychnoi kultury maibutnikh dyzaineriv u zakladakh vyshchoi osvity: Dysertatsiia doktora pedahohichnykh nauk [Theoretical and methodological foundations of forming the aesthetic culture of future designers in higher education institutions: Doctoral dissertation]. Khmelnytskyi: Khmelnytsky Humanitarian and Pedagogical Academy. [in Ukrainian]*
23. Chebotariiov, V. I. (2020). *Plastychna anatomiia u navchanni dyzaineriv: Navchal'nyi posibnyk [Plastic anatomy in teaching designers: Textbook]. Kyiv: Publishing House. [in Ukrainian]*
24. Fedorenko, O. M. (2021). *Skul'ptura yak zasib vizualizatsii idei u dyzaini [Sculpture as a means of visualizing ideas in design]. Bulletin of the Academy of Arts of Ukraine*, 4, 35–42. [in Ukrainian]
25. Walker, P. (2023). Sculpture and spatial awareness in design thinking. *International Journal of Design Innovation*, 22(1), 120–135. <https://doi.org/10.1016/j.ijdi.2023.02.006>

## ZUM MILITÄRISCHEN DISKURS ALS EINEM WESENTLICHEN BESTANDTEIL DES INSTITUTIONELLEN DISKURSES

**Olena Buhaichuk**

Doktorandin am Lehrstuhl für die deutsche Philologie,  
Nationalen Lesja-Ukrainka-Universität Wolhynien, Ukraine  
e-mail: buhaichuk.olena@vnu.edu.ua, orcid.org/0000-0002-6500-274x

### **Abstract**

Der Beitrag untersucht militärischen Diskurs als spezifische Form eines breiteren Phänomens des institutionellen Diskurses. Institutioneller Diskurs bezieht sich auf kommunikative Praktiken, die innerhalb und zwischen sozialen Institutionen stattfinden und durch ihre sozialen, politischen und historischen Kontexte geprägt sind. Der militärische Diskurs stellt einen besonderen Typ dar, der sich durch Verwendung militärisch-technischer Termini sowie durch spezifische Normen, Werte und Machtstrukturen auszeichnet. Dieser Diskurs wird nicht nur in militärischen Einrichtungen selbst, sondern auch in breiterer Gesellschaft und Medien reproduziert, wobei er sowohl Wahrnehmung von Konflikten als auch Legitimation militärischer Aktivitäten beeinflusst. Die Analyse zeigt, dass militärischer Diskurs als eine Form institutionalisierten Wissens und Kommunikationsverhaltens mit klaren gesellschaftlichen und politischen Zielen verbunden ist, die weit über den technischen oder taktischen Bereich hinausgehen. Militärische Fachbegriffe und die Sprache der Sicherheitspolitik werden als Werkzeuge zur Konstruktion und Stabilisierung von Machtverhältnissen innerhalb der Gesellschaft betrachtet. Der Beitrag beleuchtet, wie militärischer Diskurs als wesentlicher Bestandteil des institutionellen Diskurses dient, um soziale Ordnung zu gestalten und Wahrnehmung von Krieg, Sicherheit und Verteidigung zu prägen. In diesem Kontext wird militärischer Diskurs als Schlüsselressource für Formulierung und Umsetzung politischer Entscheidungen und Schaffung kollektiver Identitäten innerhalb nationaler, internationaler Gemeinschaften analysiert. Der institutionelle Diskurs wird als besondere Art der Kommunikation betrachtet, die sich einer Reihe von Regeln für Verwendung von Sprachmitteln bedient, die unter bestimmten Bedingungen und in bestimmten Kontexten regelmäßig wiederholt werden. Typen des institutionellen Diskurses werden identifiziert und ihre Normen sowie Merkmale werden umrissen. Kategorie der „sozialen Institution“ wird als Vermittler zwischen Individuum und Gesellschaft definiert und ihre Eigenschaften werden charakterisiert. Der Fokus liegt auf Merkmalen und Funktionen des militärischen Diskurses.

**Schlagwörter:** gesellschaftliche und politische Kontexte, soziale Institution, kommunikative Praktiken, Typ des Diskurses, militärisch-technische Termini.

DOI <https://doi.org/10.23856/6902>

### **1. Vorwort**

Der Beitrag befasst sich mit der Rolle des militärischen Diskurses innerhalb des institutionellen Diskurses. Die Neuheit des Themas und die Relevanz wissenschaftlicher Lösungen lassen sich in mehreren Dimensionen analysieren, und zwar was die interdisziplinäre Perspektive angeht. Das Thema berührt eine interdisziplinäre Schnittstelle zwischen Militärwissenschaften, Sozialwissenschaften, Politikwissenschaften und Kommunikationsforschung. Die Untersuchung des militärischen Diskurses als Teil des institutionellen Diskurses könnte neue



Perspektive aufzeigen, wie militärische Themen in der Gesellschaft und in Institutionen verhandelt werden. Nachfolgend lässt es sich über die gesellschaftliche Relevanz sprechen. Das Thema gewinnt an Bedeutung in einer Zeit, in der militärische Themen zunehmend Teil öffentlicher Diskussionen sind – sei es im Zusammenhang mit geopolitischen Konflikten, sicherheitspolitischen Fragen oder der gesellschaftlichen Wahrnehmung von Militärs.

Das Interesse an der Untersuchung dieser Diskurse ist vor diesem Hintergrund sowohl akademisch als auch gesellschaftlich relevant. Darüber hinaus liegt der Fokus auf institutionelle Strukturen gelegt. Während viele Studien den militärischen Diskurs isoliert betrachten, hebt der Beitrag hervor, dass dieser Diskurs nicht nur innerhalb des Militärs stattfindet, sondern auch in anderen institutionellen Kontexten – etwa in der Politik, Medien oder der Zivilgesellschaft. Zu den Aufgaben des Beitrags gehören folgende: den Begriff „institutioneller Diskurs“ zu definieren, seine Normen und Merkmale zu bestimmen, Arten des institutionellen Diskurses und ihre Anwendungsbereiche zu identifizieren.

Im vorliegenden Beitrag werden die ersten Ergebnisse einer umfassenderen Untersuchung vorgestellt, die zum Ziel hat, den militärischen Diskurs zu unterscheiden und seine Merkmale zu beschreiben. Die Verortung des militärischen Diskurses innerhalb eines breiteren institutionellen Rahmens könnte neue Einsichten in die Wechselwirkungen zwischen verschiedenen gesellschaftlichen Bereichen liefern.

Was die Relevanz wissenschaftlicher Lösungen betrifft, so geht es hier um eine theoretische Einordnung, d.h. die wissenschaftliche Relevanz des Beitrags liegt auch darin, dass er möglicherweise zur Weiterentwicklung theoretischer Konzepte beiträgt, die den militärischen Diskurs als soziales und politisches Phänomen analysieren. Er könnte beispielsweise Theorien zur Macht, zum Umgang mit Sicherheit und zur Funktionsweise von Institutionen erweitern.

Wenn man über praktische Implikationen spricht, so ist die Auseinandersetzung mit dem militärischen Diskurs nicht nur für die Wissenschaft relevant, sondern sie hat auch praktische Implikationen. Eine kritische Analyse dieses Diskurses kann helfen, wie Gesellschaften den Einsatz militärischer Mittel verstehen und in politischen Prozessen verhandeln. Dies ist besonders in Zeiten politischer Instabilität oder militärischer Einsätze von Bedeutung.

Zu erwähnen ist auch die interaktive Dynamik von Diskursen. Der Beitrag könnte auch zur Verständigung darüber beitragen, wie der militärische Diskurs mit anderen Diskursen, wie etwa dem politischen, sozialen oder ökonomischen Diskurs, verflochten ist. Eine differenzierte Analyse dieser Interaktionen bietet eine tiefere Einsicht in die Mechanismen, durch die bestimmte Narrative und Sichtweisen in der Gesellschaft etabliert werden.

Zum Objekt unserer Untersuchung werden der institutionelle Diskurs und der militärische Diskurs als einer der Typen des institutionellen Diskurses. Zum Gegenstand der Forschung gehören Typen des institutionellen Diskurses und seine Besonderheiten.

Nach einem theoretischen einleitenden Teil, in dem die Merkmale des institutionellen Diskurses als einer besonderen Art von Sprache definiert werden, die bestimmten sozialen Institutionen eigen ist, wird auf die Eigenschaften des militärischen Diskurses eingegangen, die ihn von anderen Typen des institutionellen Diskurses unterscheiden. Dies wird helfen, die Zugehörigkeit des militärischen Diskurses zum institutionellen Typ nachzuvollziehen und dazu beitragen, die Bedeutung der Rolle der Armee und insbesondere der Streitkräfte im modernen Kommunikationsprozess und in der Existenz der modernen Gesellschaft zu überdenken. Daran schließt sich die Analyse der militärischen Termini, die in den heutigen deutschsprachigen Medien vorkommen. Dieses Material wurde als Untersuchungsobjekt gewählt, weil es sich bei der militärischen Fachsprache um authentische moderne militärisch-technische Termini handelt.

Insgesamt betrachtet, scheint der Beitrag zur Erforschung eines wichtigen, jedoch oft komplex übersehene Aspekte der gesellschaftlichen Kommunikation beizutragen. Er hat sowohl für die Theorieentwicklung als auch für die Praxis potentielle Auswirkungen, was ihn als wissenschaftlichen Beitrag sowohl neu als auch relevant macht.

Die Forschungsmethodik und die Logik der Präsentation des Forschungsmaterials in diesem Beitrag beruht auf eine systematische und analytische Herangehensweise. Eine zentrale Methode ist die Diskursanalyse. Diese ermöglicht es, den militärischen Diskurs als Teil des größeren institutionellen Diskurses zu untersuchen. Der Fokus könnte darauf liegen, wie Sprache und Rhetorik in militärischen Kontexten verwendet werden und wie sie in institutionellen Rahmenbedingungen (z.B. in der Politik, den Medien oder im Militär selbst) konstituiert und vermittelt werden. Zur Korpusbildung: die Analyse basiert auf Texten, die militärische und institutionelle Diskurse widerspiegeln. Dies könnten Reden von politischen Führern, militärische Dokumente, Berichterstattung in den Medien, gesetzliche Regelungen, aber auch öffentliche Diskurse (z.B. in sozialen Medien) sein. Das Ziel dieser Analyse ist es, die Diskurse zu dekonstruieren, um zu verstehen, welche Machtstrukturen, Normen und Ideologien durch den militärischen Diskurs innerhalb des institutionellen Rahmens etabliert werden. Eine hermeneutische Methode wird verwendet, um die tiefer liegenden Bedeutungen und Zusammenhänge der diskutierten Diskurse zu interpretieren. Hierbei wäre die Zielsetzung, den militärischen Diskurs in seinem historischen und sozialen Kontext zu verstehen und zu analysieren, wie er mit anderen Diskursen (wie politischen, sozialen oder wirtschaftlichen Diskursen) verflochten ist. Eine komparative Methode wird eingesetzt, um militärische Diskurse aus verschiedenen Ländern oder unterschiedlichen historischen Epochen zu vergleichen. Hier könnten sich interessante Unterschiede und Gemeinsamkeiten hinsichtlich der Art und Weise zeigen, wie das Militär in verschiedenen gesellschaftlichen und politischen Systemen diskursiv verhandelt wird.

## 2. Zum institutionellen Diskurs

Nach einer der Klassifizierungen des Diskurses, die von Forschern, insbesondere von Honcharuk, verfolgt wird, wird der Diskurs je nach Status und charakteristischen Merkmalen der Kommunikationsteilnehmer in einen persönlichen und einen institutionellen unterteilt. Nach Ansicht des Linguisten lassen sich verschiedene Arten des institutionellen Diskurses anhand ihrer einzelnen Komponenten unterscheiden: Teilnehmer, Zeitrahmen, Ziele, Werte, Strategien (eine Reihe von Maßnahmen zur Umsetzung der kommunikativen Absichten des Sprechers), Material (Themen), Varietäten und Gattungen, Rechtstexte, diskursive Formeln. Auf Grund dieser Elemente ist es möglich, empirisches Material zu untersuchen, das es uns erlaubt, über den militärischen Diskurs als eigenständigen Diskurstyp zu sprechen (Honcharuk, 2015: 3).

Schauen wir uns den institutionellen Diskurstyp genauer an, der die Kommunikation innerhalb eines bestimmten Rahmens von Status-Rollen-Beziehungen darstellt. Der institutionelle Diskurs wird dementsprechend in diplomatische, juristische, administrative, politische, militärische, medizinische, religiöse, mystische, geschäftliche, pädagogische, werbliche, wissenschaftliche, sportliche, bühnentechnische, mediale, elektronische (Internet-Diskurs) und andere Typen unterteilt, wobei seine systemischen Merkmale seine Ziele und Teilnehmer an der Kommunikation sind.

Unter dem institutionellen Diskurs versteht die Sprachwissenschaftlerin eine besondere Art der Kommunikation zwischen bekannten oder Fremden unter Verwendung einer Reihe von Regeln für den Sprachgebrauch, die unter bestimmten Bedingungen und in bestimmten

Kontexten regelmäßig wiederholt werden. Die Normen des institutionellen Diskurses spiegeln die Werte der Gesellschaft als Ganzes und die Werte bestimmter sozialer Gruppen wider, die das System bilden.

Ein solcher spezialisierter Diskurs existiert nur dann, wenn es eine soziale Institution gibt, die diesen Diskurs gewährleistet, weshalb ein solcher Diskurs als institutionell bezeichnet wird. Das Hauptmerkmal des institutionellen Diskurses sind seine Ziele und Teilnehmer an der Kommunikation. Institutionelle Diskurse haben charakteristische Merkmale, die durch die Bedingungen der Kommunikation bestimmt werden.

Zu den Typen des institutionellen Diskurses gehören der dialogische Diskurs und der monologische Diskurs, der mündliche Diskurs und der schriftliche Diskurs, je nach der Form der Diskursdurchführung, sowie der alltägliche und der häusliche, der auf stilistischen Merkmalen beruht.

Der institutionelle Diskurs eine besondere Art der Sprache, die bestimmten sozialen Einrichtungen (Organisationen, Institutionen, Unternehmen usw.) eigen ist. Es handelt sich nicht nur um ein Gespräch, sondern um ein komplexes Kommunikationssystem, das seine eigenen Regeln, Normen, Stile und Funktionen hat, die durch die Ziele einer bestimmten Institution bestimmt werden. Der institutionelle Diskurs ist nicht nur eine Sprache, sondern ein Spiegel der sozialen Beziehungen, der Werte, Normen und Verhaltensregeln in verschiedenen Lebensbereichen widerspiegelt.

Es ist zu beachten, dass der institutionelle Diskurs durch ein spezifisches Vokabular gekennzeichnet ist. Jede Institution verfügt über ihre eigene Reihe von Begriffen, Abkürzungen und speziellen Ausdrücken, die nur von den „Eigenen“ verstanden werden. Ein weiteres Merkmal ist die standardisierte Formulierung, da häufig Schablonen verwendet werden, um die Kommunikation zu vereinfachen und effektiver zu gestalten. Rollenbeziehungen spielen ebenfalls eine wichtige Rolle, da die Sprache der Teilnehmer am institutionellen Diskurs von ihrem Status und ihrer Rolle in der Organisation abhängt. Der institutionelle Diskurs dient der Erreichung bestimmter Ziele: Informationsweitergabe, Entscheidungsfindung, Personalmanagement usw. Die Sprache im institutionellen Diskurs ist immer auf einen bestimmten Kontext bezogen: die Situation, die Teilnehmer und die Aufgaben.

Nach Ansicht der Forscher ist der institutionelle Diskurs ein Machtdiskurs, der als ein Phänomen verstanden wird, das innerhalb des institutionell gesetzten Rahmens bestimmter Sphären sozialer Kommunikation geschaffen und umgesetzt wird, d.h. soziale Institutionen – eine vom englischen Soziologen Herbert Spencer vorgeschlagene Kategorie, die definiert werden als „eine stabile, historisch gewachsene Organisationsform der gemeinsamen Aktivität von Menschen, dank derer Gemeinschaften und der gesamte soziale Organismus funktionieren, Individuen sozialisiert werden, d.h. ihr Eintritt in das gesellschaftliche Leben und die Ausübung bestimmter sozialer Funktionen und Rollen“ (*Chernysh, 2004: 22*), die zusammen die Existenz der Gesellschaft mit ihrer umfassenden Sozialstruktur gewährleisten.

Es sei darauf hingewiesen, dass soziale Einrichtungen durch einen definierten Tätigkeitszweck, spezifische Funktionen zur Erreichung der gesetzten Ziele, die Verfügbarkeit von Personal und Ressourcen, eine klare Verteilung von sozialem Status und Rollen, Rechten und Pflichten, die einer bestimmten Institution eigen sind, eine besondere Art der Regelung von Beziehungen, ein System definierter Werte und Verhaltensformen, eine große Gemeinschaft und die Integration in das Gesellschaftssystem gekennzeichnet sind.

Eine Institution ist also ein Vermittler zwischen den Individuen und der Gesellschaft, ein Mittel, mit dem die Individuen die Gesellschaft aufbauen. Die Umsetzung und Rezeption des institutionellen Diskurses führt zur Reproduktion eines bestimmten Systems sozialer

Beziehungen und Fakten, d.h. das Hauptmerkmal dieses Diskurses ist die Konstruktion eines bestimmten sozialen Inhalts (*Solohub, 2016: 188*).

Für den französischen Poststrukturalisten Michel Foucault ist die soziale Institution eine Sphäre der Unterwerfung und der diskursiven Kontrolle, der Aufsicht über die Einhaltung einer stabilen Ordnung der Dinge. Die strukturelle Ordnung, die Stabilität und die Besonderheit der sozialen Institutionen einer Gesellschaft helfen ihren Mitgliedern und Außenstehenden, sie zu erkennen. Der Philosoph widmete der Analyse der sozialen Institutionen und ihrer Rolle bei der Gestaltung der Individualität und der sozialen Ordnung große Aufmerksamkeit. Er betrachtete solche Institutionen wie Gefängnisse, psychiatrische Kliniken, Schule usw. als Orte, an denen eine disziplinarische Kontrolle ausgeübt wird und das Subjekt geformt wird (*Foucault, 1998: 12*).

Im Folgenden finden wir Beispiele für den institutionellen Diskurs:

- *Juristischer Diskurs*: charakteristisch für Gerichte, Anwaltskanzleien, Notare. Es wird eine spezielle Terminologie verwendet (*Artikel, Absatz, Anspruch*), und es wird eine klare Struktur der Dokumente benutzt.

- *Medizinischer Diskurs*: wird in Krankenhäusern und Kliniken verwendet. Spezifische Terminologie (*Diagnose, Symptom, Behandlung*), formaler Stil.

- *Bildungsdiskurs*: charakteristisch für die Ausbildungsanstalten. Es werden Vorlesungen, Seminare und Tests verwendet.

- *Geschäftsdiskurs*: wird in Unternehmen und bei Verhandlungen verwendet. Wichtig sind Klarheit, Prägnanz sowie Ergebnisorientierung.

- *Verwaltungsdiskurs*: wird in der öffentlichen Verwaltung, in Unternehmen und anderen Organisationen verwendet. Er zielt auf eine wirksame Kommunikation zwischen den verschiedenen Subjekten der Verwaltungstätigkeit ab: Regierungsbehörden, Unternehmen und Bürger.

- *Religiöser Diskurs*: wird verwendet, um religiöse Ideen, Überzeugungen und Werte zu vermitteln. Er umfasst ein breites Spektrum an Kommunikation, von religiösen Texten (Bibel, Koran, Veden) bis hin zu Predigten, Gebeten, Ritualen und Alltagsgesprächen von Gläubigen.

- *Werbediskurs*: dient der Förderung von Waren, Dienstleistungen oder Ideen. Es handelt sich um eine gezielte Kommunikation, die darauf abzielt, die Meinung des Verbrauchers zu beeinflussen, um den Wunsch zu wecken, ein bestimmtes Produkt zu kaufen oder eine bestimmte Dienstleistung in Anspruch zu nehmen.

- *Sportdiskurs*: wird im Zusammenhang mit Sport verwendet und umfasst sowohl gesprochene als auch geschriebene Texte, die sich auf Sportereignisse, Sportler, Mannschaften und Fans beziehen.

- *Wissenschaftlicher Diskurs*: wird im wissenschaftlichen Bereich verwendet, um Wissen und Forschungsergebnisse zu vermitteln und wissenschaftliche Probleme zu diskutieren.

- *Bühnendiskurs*: wird im Rahmen einer Theatervorstellung oder eines Films realisiert.

- *Mystischer Diskurs*: wird verwendet, um Erfahrungen im Zusammenhang mit dem Mystischen, Übernatürlichen, Religiösen oder Spirituellen zu vermitteln.

### 3. Zum militärischen Diskurs

Auf der Grundlage der oben angegebenen Klassifizierung lässt sich der militärische Diskurs, der im Mittelpunkt unserer Forschung steht, also einem eindeutig definierbaren Diskurstyp zuordnen. Laut diesem Ansatz ist der militärische Diskurs ein institutioneller Typ, der den militärisch-politischen Bezugsraum, in dem die Kommunikation stattfindet, und die

professionelle Rolle der Kommunikationsteilnehmer als Vertreter einer bestimmten sozialen Institution berücksichtigt.

Der militärische Diskurs ein institutioneller Diskurs, weil er viele seiner Eigenschaften aufweist. Er hebt sich in Bezug auf die moderne Gesellschaft neben anderen Arten des institutionellen Diskurses ab (Korolova, 2021: 370).

Der militärische Diskurs ist eine Waffe und ein Führungsinstrument, eine besondere Form der Sprache, die von den Streitkräften verwendet wird und mit militärischen Aktivitäten zusammenhängt. Zunächst einmal ist er ein komplexes Kommunikationssystem, das seine eigenen spezifischen Merkmale und Funktionen hat. Als eine der Arten des institutionellen Diskurses zeichnet sich der militärische Diskurs auch durch das Vorhandensein eines spezifischen Vokabulars aus, da er voll von speziellen Begriffen, Abkürzungen und Jargon ist, die die Besonderheiten der militärischen Aktivitäten widerspiegeln, z. D. „Manöver“, „Feuerkontakt“, „Gefechtsbefehl“ usw.

Charakteristisch für den militärischen Diskurs sind auch standardisierte Formulierungen, die einen hohen Grad an Formalität aufweisen, da das Militär prägnante Aussagen verwendet, die eine klare Struktur aufweisen und eine schnelle Übermittlung von Befehlen und Informationen ermöglichen. Sie ist auch durch Hierarchie gekennzeichnet. Befehle werden klar und unmissverständlich erteilt. Sie zeichnet sich durch Präzision und Eindeutigkeit aus: Jedes Wort hat eine genaue Bedeutung, um Missverständnisse bei der Aufgabenerfüllung zu vermeiden. Die Funktionalität darf nicht vergessen werden. Konzentration auf die Handlung – die Sprache zielt auf die Ausführung konkreter Aufgaben ab, nicht auf die Erörterung abstrakter Fragen, wie z. B. die Führung von Truppen, die Koordinierung von Aktionen, die Aufrechterhaltung der Disziplin usw. Emotionale Zurückhaltung ist ein weiteres Merkmal des militärischen Diskurses. In vielen Situationen sollten Emotionen verborgen werden, um die Entscheidungsfindung nicht zu beeinflussen.

Es scheint möglich, folgende Funktionen des militärischen Diskurses zu unterscheiden:

- *Information*: Übermittlung von Informationen über die Lage, Aufgaben, Pläne, Berichte und andere militärische Unterlagen;
- *Verwaltung*: Erteilung von Befehlen, Koordinierung der Maßnahmen der Abteilungen;
- *Motivation*: Aufrechterhaltung der Moral, Förderung des Teamgeistes;
- *Identifizierung*: Zusammenschluss von Militärangehörigen zu einer einzigen Gemeinschaft durch einen gemeinsamen Sprachcode.

Es sei darauf hingewiesen, dass es zu Besonderheiten des militärischen Diskurses folgende gehören:

- ■ Hoher Grad an Formalität: Der militärische Diskurs zeichnet sich durch eine klare Struktur der Aussagen und die Verwendung standardisierter Formulierungen aus;
- ■ Emotionale Zurückhaltung: In vielen Situationen müssen Emotionen verborgen werden, um die Entscheidungsfindung nicht zu beeinflussen;
- ■ Konzentration auf das Handeln: Die Sprache ist eher auf die Ausführung von Aufgaben als auf die Erörterung abstrakter Themen ausgerichtet.

Moderne Kriege werden nicht nur auf dem Schlachtfeld, sondern auch im Informationsraum geführt. Daher spielt der militärische Diskurs heute eine noch größere Rolle. Er dient der öffentlichen Meinungsbildung, der Propaganda und der Desinformation.

Das Verständnis des militärischen Diskurses ist nicht nur für das Militär wichtig, sondern auch für jeden, der sich für Politik, Geschichte und soziale Prozesse interessiert. Schließlich ist die Sprache ein mächtiges Instrument, das Menschen sowohl vereinen als auch spalten kann.



Was die Besonderheiten des militärischen Diskurses in der deutschen Kultur angeht, so hat der militärische Diskurs in Deutschland tiefe historische Wurzeln und einzigartige Merkmale, die durch komplexe politische, soziale und kulturelle Prozesse geprägt wurden.

Im Hinblick auf den historischen Kontext lassen sich folgende Aspekte hervorheben:

- die militärische Macht des Reiches: Seit Jahrhunderten ist die deutsche Armee ein Symbol für die Stärke und Einheit des Staates. Das preußische Armeemodell, das Disziplin, Loyalität und Effizienz betonte, hat die deutsche Kultur maßgeblich geprägt.

- zwei Weltkriege: Die tragischen Erfahrungen der beiden Weltkriege, in denen Deutschland eine Schlüsselrolle spielte, hatten tiefgreifende Auswirkungen auf die Wahrnehmung von Krieg und Militärdienst in der deutschen Gesellschaft.

- geteiltes Deutschland: Nach dem Zweiten Weltkrieg wurde Deutschland in zwei Teile geteilt: BRD und DDR. Jeder dieser Staaten hatte seine eigene Militärdoktrin und seinen eigenen Diskurs.

Was eigentlich dem militärischen Diskurs in Deutschland eigen ist:

- das Tabu des Krieges: Die durch den Krieg verursachten Gräueltaten und Zerstörungen führten in der deutschen Gesellschaft zu einer Anti-Kriegs-Stimmung. Der Krieg wurde zu einem Symbol des Bösen und der Zerstörung, und jede aggressive Rhetorik wurde mit großer Vorsicht wahrgenommen. Dies hatte einen erheblichen Einfluss auf den militärischen Diskurs, der zurückhaltender und vorsichtiger wurde. Der Zweite Weltkrieg hat tiefe Spuren in der deutschen Geschichte und Kultur hinterlassen, und sein Einfluss auf den militärischen Diskurs ist einer der wichtigsten. Dieses tragische Ereignis hat die Wahrnehmung des Krieges, der Armee und der Rolle Deutschlands in der Welt radikal verändert.

Es wird über die Vorsicht vor Nationalismus gesprochen. Der Nationalismus, der eine wichtige Rolle bei der Auslösung des Zweiten Weltkriegs gespielt hat, ist noch zu einem Tabuthema geworden. Der militärische Diskurs weist auf die europäische Integration und die Ablehnung aller Formen des aggressiven Nationalismus hin.

- zivile Kontrolle über die Streitkräfte: Es ist über die Demokratisierung der Armee zu betonen, weil nach dem Krieg die Armee unter zivile Kontrolle gestellt wurde und ihre Aktivitäten eng mit demokratischen Werten verknüpft wurde. Es wurde ein System der zivilen Kontrolle über die Streitkräfte eingeführt, um zu verhindern, dass sich die Ereignisse der Vergangenheit wiederholen. Dieser Grundsatz spiegelt sich im militärischen Diskurs wider, in dem die Unterordnung der Armee unter die demokratischen Institutionen betont wird. Der militärische Diskurs wurde offener und transparenter und betonte die Rechenschaftspflicht der Armee gegenüber der Gesellschaft.

- internationale Zusammenarbeit: Deutschland beteiligt sich aktiv an internationalen friedenserhaltenden Missionen und ist aktiver Mitglied solcher internationalen Organisationen wie der NATO und der Organisation der Vereinten Nationen. Diese Tatsache hat den militärischen Diskurs geprägt, der die Bedeutung der kollektiven Sicherheit und der internationalen Zusammenarbeit hervorhebt. Dies führte zu einem Paradigmawechsel im militärischen Diskurs, der die Bedeutung der kollektiven Sicherheit und der friedlichen Konfliktlösung zu betonen begann.

- Betonung der humanitären Aspekte: Der zeitgenössische deutsche militärische Diskurs hat begonnen, die humanitären Aspekte von Militäroperationen, wie den Schutz der Zivilbevölkerung und der Einhaltung des humanitären Völkerrechts, zu betonen. Militäroperationen werden nicht nur als Mittel zur Verteidigung nationaler Interessen angesehen, sondern auch als Möglichkeit, anderen Ländern und Völkern zu helfen.

In Anbetracht von heute ist der Stand des militärischen Diskurses in Deutschland als folgende:

- Debatte über die Rolle der Bundeswehr: In den letzten Jahren hat es in Deutschland eine rege Debatte über die Rolle der Bundeswehr in der modernen Welt gegeben. Auf der einen Seite steht die Einsicht, dass die Verteidigungsfähigkeit des Landes gestärkt werden muss, auf der anderen Seite gibt es Befürchtungen vor einem Wiederaufleben des Militarismus.

- die Auswirkungen der internationalen Ereignisse:

Nach Giegerich (*Giegerich, 2021*) bedroht der Aufstieg oder Wiederaufstieg revisionistischer, repressiver und autoritärer Mächte wie China und Russland in fundamentaler Weise die westliche, durch die USA garantierte internationale Ordnung, die den Aufstieg und die Sicherheit der Bundesrepublik Deutschlands nach dem Zweiten Weltkrieg gewährleistet hat. Die Ereignisse der letzten Jahre, wie die Annexion der Krim durch Russland und der Krieg in der Ukraine, haben Deutschland gezwungen, seine Verteidigungspolitik zu überdenken. Dies wirkt sich wiederum auf den militärischen Diskurs aus, der strenger und weniger passiv wird. Die Veränderungen, die im militärischen Diskurs stattgefunden haben, haben zur Absage des Militarismus geführt, d.h. der militärische Diskurs hörte auf, den Krieg zu romantisieren und militärische Gewalt zu verherrlichen. Stattdessen wurde der Schwerpunkt auf friedliche Konfliktlösung und internationale Zusammenarbeit gelegt. Was die demokratische Kontrolle betrifft, wurde das Militär gegenüber den zivilen Behörden und der Gesellschaft im Allgemeinen rechenschaftspflichtig. Der militärische Diskurs begann, die Werte von Demokratie und Rechtsstaatlichkeit widerzuspiegeln.

Im internationalen Kontext hat sich der militärische Diskurs stärker international ausgerichtet und betont die Rolle Deutschlands in der nationalen Sicherheit. Der militärische Diskurs, der nach dem Zweiten Weltkrieg entstanden ist, beeinflusst Deutschland bis heute. Er bestimmt das Verhältnis zwischen der Armee und der Gesellschaft sowie die Außenpolitik des Landes. Der Zweite Weltkrieg war ein Katalysator für radikale Veränderungen im deutschen Militärdiskurs. Die Ablehnung des Militarismus, die Demokratisierung der Armee und die Betonung der internationalen Kooperation waren die wichtigsten Trends, die sich nach dem Krieg abzeichneten. Diese Veränderungen haben das moderne Deutschland nachhaltig und tiefgreifend geprägt. Aktuelle Herausforderungen wie der Terrorismus und die Migrationskrise zwingen Deutschland jedoch dazu, seine Rolle in der Welt zu überdenken und dementsprechend seinen militärischen Diskurs zu verändern.

#### 4. Zu militärischen Termini

Die militärische Fachsprache verfügt über konkrete Begriffe und hat zur Entwicklung einer bestimmten Terminologie beigetragen (*Jakosz, M. u.a.: 2024: 71*). Diese Fachsprache ist sehr bedeutsam, denn sie unterstützt die Verständigung unter den Mitgliedern der Armee eines Landes und zwischen den Armeen der Welt. Außerdem gibt uns die Sprache der Soldaten bzw. der Wehrpflichtigen einen tieferen Einblick in die Lebensweise des Militärs, weil Sprache und Gesellschaft eng zusammenhängen. Militärische Terminologie im modernen Deutsch umfasst eine Vielzahl von Begriffen, die in der Bundeswehr sowie in anderen militärischen Kontexten verwendet werden. Diese Terminologie ist wichtig für die Kommunikation innerhalb der Streitkräfte und kann auch in zivilen Diskussionen über militärische Themen vorkommen.

Nun werfen wir einen Blick auf die Begriffe der militärischen Terminologie im modernen Deutschen. Zentrale Begriffe und Konzepte beinhalten allgemeine Begriffe, unter denen *Bundeswehr* (die Streitkräfte der Bundesrepublik Deutschland, die aus Heer (Landstreitkräfte),

*Luftwaffe* (Luftstreitkräfte) und *Marine* (Seestreitkräfte) besteht); *Soldat/Soldatin* (ein Mitglied der Streitkräfte); *Militär* (allgemeiner Begriff für die bewaffneten Streitkräfte eines Landes) zu erwähnen sind. Außerdem gehören dazu Ränge und Dienstgrade, z. B. *Gefreiter* (der niedrigste Dienstgrad in der Bundeswehr); *Unteroffizier* (ein Dienstgrad zwischen Soldat und Offizier); *Hauptmann* (ein Offiziersdienstgrad, der in der Regel für Kompanieführer verwendet wird); *Oberst* (ein höherer Offiziersdienstgrad, oft verantwortlich für ein Bataillon oder eine Brigade). Darüber hinaus zählt man hier auch militärische Einheiten, z. B. *Kompanie* (eine militärische Einheit, die in der Regel aus mehreren Zügen besteht); *Bataillon* (eine größere Einheit, die aus mehreren Kompanien besteht); *Brigade* (eine noch größere Einheit, die mehrere Bataillone umfassen kann). Nicht zu vergessen sind auch die Ausrüstung und Technik, z. B. *Panzer* (ein gepanzertes Kampffahrzeug, das im Gefecht eingesetzt wird); *Feldgeschütz* (eine Art von Artillerie, die zur Unterstützung von Bodentruppen verwendet wird); *Drohne* (unbemanntes Luftfahrzeug, das für Aufklärungs- oder Angriffsmissionen eingesetzt wird). Als nächstes Konzept dienen verschiedene Einsätze und Operationen, z. B. *Friedensmission* (Einsätze, die darauf abzielen, Frieden und Stabilität in Konfliktregionen zu fördern); *humanitäre Einsätze* (militärische Operationen, die zur Unterstützung von Zivilisten in Notlagen durchgeführt werden); *Kriegsführung* (Der Einsatz militärischer Mittel zur Erreichung politischer Ziele). Was zur Sicherheit und Verteidigung, so gehören dazu, z. B. *NATO* (Die Nordatlantikpakt-Organisation, ein militärisches Bündnis, dem Deutschland angehört); *Verteidigungspolitik* (Strategien und Maßnahmen, die ein Land zum Schutz seiner nationalen Sicherheit ergreift); militärische Strategie (Langfristige Planung und Durchführung militärischer Operationen). Wenn wir über rechtliche Aspekte sprechen, so sind hier *Völkerrecht* (regeln und Normen, die das Verhalten von Staaten im Krieg und Frieden regeln); *Kriegsvölkerrecht* (Spezielle Normen, die im Kontext von bewaffneten Konflikten gelten) zu erwähnen.

Diese Begriffe sind darum wichtig, dass diejenigen, die sich mit diesem Thema beschäftigen, ein Verständnis für die Bedeutung und den Kontext dieser Begriffe entwickeln, um effektiv in Diskussionen über militärische Themen kommunizieren zu können.

## 5. Fazit und Ausblick

Basierend auf den Ergebnissen unserer Forschung zum militärischen Diskurs als einem wesentlichen Bestandteil des institutionellen Diskurses, könnten die folgenden Schlussfolgerungen und Perspektiven für die weitere Forschung formuliert werden:

Der militärische Diskurs ist ein komplexes und vielschichtiges Phänomen, das weit über die bloße Übermittlung von Befehlen hinausgeht. Er ist geprägt von historischen Erfahrungen, politischen Realitäten und öffentlichen Stimmungen. Er fungiert als ein komplexes Kommunikationssystem, das eine klare, wirksame und sichere Kommunikation in einem militärischen Kontext gewährleisten soll, der die spezifischen Werte und die Struktur der Armee widerspiegelt und stärkt. Der militärische Diskurs prägt die Identität, die Kultur und das Verhalten der Streitkräfte und hat weitreichende Auswirkungen auf die Gesellschaft als Ganzes. Obwohl die Anti-Kriegs-Stimmung nach wie vor stark ist, ist sich Deutschland zunehmend der Notwendigkeit bewusst, seine Verteidigungsfähigkeiten zu stärken. Der aktuelle deutsche Militärdiskurs ist durch eine Kombination aus Zurückhaltung und Pragmatismus sowie durch die Betonung der internationalen Zusammenarbeit und der Einhaltung humanitärer Grundsätze gekennzeichnet. Das Verständnis dieser Art von Diskurs ist daher von entscheidender Bedeutung für das Verständnis ihrer Funktionen und potentiellen Gefahren.



Der militärische Diskurs ist eng mit politischen und gesellschaftlichen Diskursen verwoben. Eine der zentralen Erkenntnisse könnte sein, dass der militärische Diskurs nicht isoliert, sondern tief in andere institutionelle Diskurse eingebettet ist. Er wird nicht nur innerhalb des Militärs formuliert, sondern beeinflusst auch politische Entscheidungsprozesse, Medienberichterstattung und öffentliche Macht, Sicherheit und nationale Identität eingebunden sind. Beispielsweise verwenden politische Entscheidungsträger und Militärs ähnliche rhetorische Strategien, um Konflikte oder Sicherheitsbedrohungen darzustellen, wodurch ein konsistentes Bild von „Feinden“ und „Sicherheit“ entsteht. Medien und öffentliche Diskurse übernehmen und verstärken diese Narrative oft.

Der militärische Diskurs dient der Legitimation und Aufrechterhaltung von Machtstrukturen. Er wird als ein Werkzeug zur Legitimierung politischer Macht und militärischer Strategien verstanden. Der militärische Diskurs spielt eine entscheidende Rolle bei der Rechtfertigung militärischer Einsätze und der Förderung einer nationalen Sicherheitsnarrative. Hierdurch werden bestimmte politische Handlungen (z.B. militärische Interventionen) als notwendig und gerechtfertigt dargestellt. Als Beispiel dient die Tatsache, dass es in vielen Ländern der militärische Diskurs verwendet wird, um das Bild eines „gerechten Krieges“ oder „notwendiger Verteidigung“ zu konstruieren, der es dem Militär ermöglicht, Handlungen durchzuführen, die sonst möglicherweise als aggressiv oder völkerrechtswidrig wahrgenommen werden könnten.

Medien spielen eine Schlüsselrolle in der Verbreitung und Verstärkung des militärischen Diskurses. Sie sind nicht nur passive Vermittler des militärischen Diskurses, sondern aktive Akteure in dessen Konstruktion. Sie übernehmen und verstärken oft militärische Narrative, wodurch der Diskurs in der breiten Öffentlichkeit verankert wird. Dies könnte zu einer stärkeren Akzeptanz militaristischer Politiken und einer Verschiebung in der öffentlichen Wahrnehmung von Sicherheit und Krieg führen. Zum Beispiel wird oft die Kriegsberichterstattung durch die Linsen des Militärs und der Regierung gefiltert, was zu einer einseitigen Darstellung von Konflikten führt, die die öffentliche Zustimmung für militärische Aktionen fördern kann.

Institutionelle Konflikte und Interdependenzen prägen den militärischen Diskurs. Er entsteht nicht in einem Vakuum, sondern wird durch interne institutionelle Konflikte und Machtkämpfe zwischen verschiedenen Akteuren (Militär, Politik, Medien, Gesellschaft) geprägt. Diese Spannungen beeinflussen die Art und Weise, wie militärische Themen kommuniziert und welche Narrative letztlich durchgesetzt werden. Beispielsweise kann der militärische Diskurs in Ländern mit einem starken Einfluss des Militärs auf die Politik direkt die nationale Sicherheitsstrategie beeinflussen, während in demokratischeren Systemen politische Akteure versuchen könnten, den militärischen Diskurs zu steuern oder in ihre eigenen politischen Agenden zu integrieren.

In der Untersuchung der Rolle der Streitkräfte in der Gesellschaft sehen wir Perspektiven für unsere weiteren Forschungen. Zukünftige Forschung könnte die erworbenen Ergebnisse weiter vertiefen, insbesondere im Hinblick auf die geopolitischen, gesellschaftlichen und technologischen Entwicklungen, die den militärischen Diskurs in der heutigen Welt prägen.

### Literaturverzeichnis

1. Chernysh, N. (2004). *Sotsiologhiia: Lektsii* / N. Chernysh. – Lwiw: Kalvariia. 460 S. [auf Ukrainisch]
2. Foucault, M. (1998). *Dystsiplina ta pokarannia* / Pereklad z frantsuzkoi P. Tarashchuk. – Kyjiw : Osnowy. 392 S. ISBN 966–500–011-X. [auf Ukrainisch]

3. Giegerich, B. & Terhalle, M. (2021). *Verteidigung ist Pflicht – Deutschlands außenpolitische Kultur muss strategisch werden – Teil 1. SIRIUS – Zeitschrift für Strategische Analysen*, 5(3), 203–226. <https://doi.org/10.1515/sirius-2021-3002>
4. Honcharuk, L. (2015). *Zhanrovi aspekty perekladu ofitsiino-dilovykh dokumentiv franko-movnoho viiskovoho dyskursu [Dissertation]: 10.02.16. Kyivskiy natsionalnyi universytet imeni Tarasa Shevchenka. Kyiv. 211 S. [auf Ukrainisch]*
5. Jakosz, M., Wilke, B. (2024). *Militärische Fachsprache in literarischen Kriegstagebüchern am Beispiel von ‚Schreib das auf, Kisch!‘ von Egon Erwin Kisch. Linguistische Treffen in Wrocław* 25, 2024 (I): 71–90. DOI: 10.23817/lingtreff.25–4.
6. Korolova T., Sorich R., Aleksandrova O. (2021). *Viiskovy dyskurs ta osoblyvosti yoho perekladu. Odesa : Naukovyi visnyk Pivdennoukrainskoho natsionalnoho pedahohichnoho universytetu imeni K. D. Ushynskoho PNPU. Vypusk 33. S. 369–382. [auf Ukrainisch]*
7. Solohub L. (2016). *Metodolohiia doslidzhennia instytutsiinoho dyskursu / Naukovi zapysky Natsionalnoho universytetu «Ostrozka akademii». Seriia «Filolohiia»: Zbirnyk naukovykh prats. Vypusk 63. S. 187–189. [auf Ukrainisch]*

## MORAL AND AESTHETIC PARAMETERS IN THE SYSTEM OF VALUES OF ADOLESCENT MUSIC SCHOOL STUDENTS

**Oleksandr Gvozditskiy**

Postgraduate Student, Dragomanov Ukrainian State University, Ukraine  
e-mail: o.p.gvozditskiy@udu.edu.ua, orcid.org/0009-0004-9230-6222

**Viktoriya Bukhanievykh**

Associate Professor at the Department of Instrumental Performance and Orchestral Conducting, Mykhailo Drahomanov Ukrainian State University, Ukraine  
e-mail: v.v.bukhanievykh@udu.edu.ua, orcid.org/0009-0002-6468-7852

### Summary

The article analyzes the concept of "*value orientations*", which are viewed as meaning-making attitudes internalized by individuals through the process of socialization. The article explores the specific features of how value orientations develop during adolescence. It is particularly noted that, at this stage of life, peer groups – engaged in shared activities and communication – exert a significant influence on this process.

The development of an adolescent's hierarchical value system is examined through key parameters: the degree to which the hierarchical structure of values is formed as a unified whole, the content of value orientations (characterized by a set of specific values included in the structure), and the direction of this structure.

The article also addresses the issue of cultural self-identification in the context of value orientation formation, briefly outlining the role of experiential learning in this process. It is noted that cultural identification in adolescence often takes on a transitional, intermediate nature, in which identity is no longer rooted in the immediate environment and begins to seek out new forms.

The article explores the educational influence of art on the formation of personal value orientations. It highlights the role of music education—particularly learning to play a musical instrument – in fostering value orientations that help adolescents resist negative influences and favor constructive choices. Finally, the article discusses the main factors to be considered when selecting and implementing methods and tools for supporting adolescents' personal development and the formation of their value systems.

**Key words:** including the cultivation of ideals, the process of learning to play a musical instrument.

DOI <https://doi.org/10.23856/6903>

### 1. Introduction

One of the fundamental categories in constructing a new paradigm of the philosophy of education is the category of value. As a key concept, it is employed across philosophy, pedagogy, psychology, and aesthetics. Pedagogy functions as a social mechanism for the continuity of universal and national moral and aesthetic values, which form the humanistic substance of culture. Aesthetic education through musical art fosters the development of moral virtues in the individual and enables the transmission of spiritual values from both global and national

cultures. The significance of the aesthetic function of musical art lies in its capacity to allow a person to comprehend the world through the laws of beauty. Music contributes to the formation of an individual's value consciousness, teaching them to perceive life through the prism of artistic imagery.

The process of moral and cultural self-identification unfolds through the accumulation of knowledge, the expansion of social contacts, and immersion in the world of culture and its comprehension. Musical art carries immense moral and aesthetic potential. In light of this, the content of music education incorporates norms and values that embody national cultural traditions while closely intersecting with universal human values.

For every adolescent, the task of building a value hierarchy becomes a pressing one – that is, identifying the personal foundations of their attitude toward the values of art. The process of selecting core values includes cognition achieved both through conscious understanding and emotional perception. It is precisely this emotional perception that plays a decisive role in the adolescent's choice of personally significant moral and aesthetic values. The values of musical art chosen by the student thus become the object of newly formed personal needs.

## 2. Analysis of publications and the purpose of the study

The relationship between moral and aesthetic values has been explored in the works of many philosophers, including Plato, Aristotle, B. Gaut, I. Kant (*Kant, 2000*), G. E. Moore, F. Nietzsche (*Nitsshe, 2002*), Panos Paris, J.-P (*Paris 2021*), Sartre (*Sartr, 2022*), A. Schopenhauer (*Schopenhau, 2014*), among others. The issue of individuals' conscious internalization of socially significant moral values was examined by I. Bekh (*Bekh (2012)*). Research on the problems of spiritual and moral education has been undertaken by scholars such as V. Bordyuk, O. Hrytsuta, H. Shevchenko, N. Poltavska (*Hrytsiuta, 2021*), and others. Various aspects of the issue of students' aesthetic orientations have been studied by H. Vatamanyuk, I. Zyazyun (*Ziazium, 1998*), H. Padalka (*Padalka. 2008*), M. Pecheniuk, O. Pryadko (*Pecheniuk, 2014*), O. Rostovskyi, O. Rudnytska (*Rudnytska, 1997*), among others. The use of a subcultural context in music lessons for shaping adolescents' emotional-aesthetic experience – through the application of an art-therapeutic pedagogical methodology – was investigated by T. Strohal (*Strohal, 2018*). Aesthetic development of high school students in the context of a children's music school was studied by Zhang Gui (*Chzhan, 2022*).

For a more precise definition of the specific characteristics of adolescence, this stage of human life is typically divided into two phases: early adolescence (generally from ages 11 to 14), and middle (or late) adolescence (from ages 15 to 19) (*Tokareva, 2014*). Since music schools in Ukraine enroll students up to the age of 18, our study will encompass this entire period, even though, in practice, most students aim to complete their music school education by the age of 14–15.

Despite the attention given in academic literature to the formation of moral and aesthetic values, the issue of shaping a system of moral and aesthetic value orientations among adolescents in the context of music education—particularly in the process of learning to play a musical instrument—remains highly relevant. Therefore, the aim of our research is to examine the moral and aesthetic parameters within the system of value orientations of adolescent students attending music schools.

### 3. Analysis of the Concept of "Value Orientations" and the Definition of Moral and Aesthetic Values

Questions of good and evil, beauty and ugliness, and the internal connections between ethical and aesthetic categories have always intrigued humanity. The idea that beauty and morality are interrelated – because they both express goodness, order, and harmony – is upheld in the works of Plato, Aristotle, B. Gaut, P. Paris, among others (Paris, 2021). Conversely, other thinkers consider beauty and morality to be largely independent of one another (I. Kant (Kant, 2000), A. Schopenhauer (Schopenhauer, 2014), F. Nietzsche (Nietzsche, 2002), J.-P. Sartre (Sartre, 2022), and others).

The relationship between beauty and morality has also been of interest to psychologists. Research has shown that people tend to associate physical beauty with positive character traits such as intelligence, kindness, and honesty, whereas physical unattractiveness is often linked to negative traits. There is an implied subconscious belief that physical beauty reflects inner goodness: *"regardless of whether we describe the way an object of moral admiration looks as beautiful, rather than simply admirable, or as a formal object of a particular emotion, such as the elevation that accompanies moral beauty"* (Paris, 2021, p. 618).

P. Paris emphasizes the importance of connecting philosophical and empirical research and their significance for education. He argues that cultivating admiration and developing a taste for certain kinds of beauty requires different methods and strategies: *"If we shape people's conceptual outlook in one way, we achieve one set of outcomes; if we change those practices, we may achieve different ones. Beauty offers a more comprehensive, motivationally robust, and directed attitude toward its object and... is linked to morally relevant self-directed motivation, which simple admiration lacks. Therefore, it should be recognized both in interpreting moral theory and in developing our moral-motivational, educational, and research programs"* (Paris, 2021, p. 625).

According to P. Paris, virtues are *"complex psychological dispositions consisting of cognitive, affective, and motivational components, including beliefs, rules, and principles... which are internalized"* (Paris, 2021, p. 612). Negative ethical and aesthetic experiences are also valuable and necessary, as they help identify what harms quality of life and the environment, providing incentives for improvement. Together, motivational tendencies enable the reproduction or promotion of beauty and the elimination of ugliness, and can serve as strong motivations to avoid moral vice and strive for moral virtue.

The concept of value specifies the socio-historical significance of cultural phenomena for society and the individual, serving as a key factor in regulating human behavior. Cultural values, by expressing the positive or negative meaning of phenomena and objects of reality, define the boundaries between good and evil, the beautiful and the ugly, the ideal and the unworthy, and determine the alignment of people's actions with the needs of society (Haidukevych, 2011).

A *parameter* is a quantity that characterizes a fundamental property or feature of an object or phenomenon. We understand *moral-aesthetic parameters* as ethically and aesthetically recognized and internalized norms that are part of an individual's personal value system.

The formation and development of a personal system of values occurs through socialization – a process through which an individual becomes a full-fledged member of society within the scope of social relations. When speaking of adolescents' value orientations, it is important to consider generational interaction. The term *generation* refers to people born around the same time who experience relatively similar life events in their formative years (Paris, 2021, p. 49). The basis of value orientations – as meaningful attitudes internalized during socialization – lies

in generalized value concepts reflecting the social experience of a generation. Hence, a system of value orientations serves both as an indicator of generational interests, needs, social stance, and level of spiritual development, and as a predictor of what can be expected from that generation. The younger generation assimilates what is acceptable from the past, adapted to its current socio-historical conditions, making the formation of new value orientations anything but random.

Thus, the main function of a generation is to transmit cultural values. Adolescents are a generation in the midst of socialization, preparing to assume social roles. They transition from being passive objects of cultural influence to becoming active creators of culture. This intergenerational process can be characterized as “inheritance through negation.”

In adolescence, the brain gains the capacity for abstract thinking, leading to the assimilation and re-evaluation of many concepts and categories. Due to a lack of experience and information, this often results in a critical perspective. At this stage, value orientations begin to form not only through emotionally positive or negative experiences but also through evaluative judgments. This fosters adolescents’ motivation and activity in mastering systems of moral and aesthetic values.

The content and structure of a person’s value orientation depend on the nature of their involvement in different types of activities. Development occurs in stages, through mastery of object-related activity and interpersonal interaction. The internalization of values (their integration into the individual’s inner world) is facilitated through the following processes:

- cognition (value serves as one of the determinants of the cognitive process);
- the formation of behavioral motives, beliefs, and convictions.

Adolescents are socialized primarily within groups (school classes, peer collectives based on shared interests, such as music schools or extracurricular clubs). Adolescents who have opportunities to sing, collaborate, and share musical experiences with others feel connected to and part of the music community. They seek music that resonates with their emotions, ideals, and means of self-expression (*Duman, 2024*). Communication and activity within any group are determined and regulated by the social relations of the adolescents involved.

Within a group, adolescents do not hold identical positions relative to one another or the group’s activities. Each member occupies a particular status within the system of interpersonal relationships, defined by their personal and professional qualities, responsibilities, and the recognition or lack thereof by others.

Through collective activities and communication, adolescents gain experience in various forms of evaluation, which are only possible with the presence of certain value orientations. They assess their behavior by:

- comparing what they do with the expectations of others (taking into account others’ opinions and demands);
- constantly measuring themselves against an ideal and experiencing satisfaction or dissatisfaction based on the degree of alignment.

An adolescent’s evaluation of their group reveals the extent of their integration and mutual understanding within it. A high evaluation suggests that they are socially engaged, identify with the group’s interests, respect its values, exhibit collectivism, and experience emotional comfort and stability. The social relationships within the group contribute to the formation of values, ideals, convictions, and worldviews.

Value orientations determine the vector of thinking and behavior, enabling adolescents to distinguish the meaningful from the insignificant in life. They encapsulate both the personal life experience of the individual and the assimilated experience of humanity as a whole. Therefore,



we view the process of educating adolescents in music schools as the guided development or transformation of their value orientations. In this context, a music school student's value orientations represent the moral and aesthetic foundations for evaluating reality through social and cultural activity.

#### **4. Characteristics of the Formation of Moral and Aesthetic Values in Adolescents through Guitar Lessons**

Adolescence is characterized by an intensification of all cognitive processes and an increased interest in many aspects of the surrounding environment. A teenager's involvement in various types of activities (especially group activities) significantly contributes to transforming interest into sustained curiosity – an essential condition for the development of a multifaceted and well-rounded personality. One of the key achievements of adolescence is the acquisition of the first experiences in understanding the necessity and ability to properly align personal capacities with needs, and, as a result, to build long-term plans (acquiring necessary knowledge and skills, choosing a profession), and critically evaluating their own value system.

During this period, adolescents begin to actively form the principles that guide their behavior. In particular, the concept of duty takes shape. Fulfilling a duty is associated by adolescents with the notion of honor, without which self-respect is impossible. A sense of duty becomes a motivator for actions. Interpersonal relationships within groups, responsibilities at school and in the family contribute to developing a sense of responsibility in adolescents. Participation in a guitar ensemble is a powerful motivator for both forming aesthetic musical perceptions and cultivating a sense of duty and responsibility to the collective.

Each adolescent has their own system of values, structured in a specific hierarchical relationship. The development level of an adolescent's value system is assessed based on two parameters:

- the degree of formation of the hierarchical value structure as an integrated whole (where the unifying system-forming factor is the adolescent's personal characteristics);
- the content of value orientations, characterized by the specific set of values within the structure and their direction.

The first parameter reflects the level of personal maturity of the adolescent, largely defined by their ability to form and systematize psychological structures (i.e., their ability to internalize acquired knowledge and skills). This capacity for internalization results from a certain degree of development of higher mental functions and socio-psychological maturity.

The second parameter allows for the classification of the content-based direction of the adolescent's personality. Depending on the specific values within their value orientation structure, and the balance and prioritization of these values, it is possible to determine the life goals their activity is directed toward. Analysis of the value system's content and structure also helps assess how well an adolescent's value orientation aligns with societal standards and the goals of education and upbringing.

The list of moral and aesthetic values for adolescents is not limited to experiences that directly relate to their lives. Through empathy and a growing understanding of the complex causes influencing others' lives, adolescents become engaged with generalized values, belief systems, and moral-aesthetic norms that may not directly pertain to their own life experience.

Adolescents' value orientations are often embodied in ideal personal examples drawn from various spheres of life. Among the core moral values important to modern adolescents are: high moral qualities (duty, honor, responsibility), patience, prudence, kindness, honesty, justice,

courage, conscience, and compassion. Their ideals may include: heroes; individuals with outstanding achievements in their professions; people who adopt orphans; family members and caregivers characterized by kindness, tenderness, fairness, and sincerity; as well as athletes, artists, and other popular public figures.

By assimilating behavioral standards from social relationships, adolescents begin to define the limits of their own identification within the framework of mass culture, which tends to unify spiritual needs and redirect them into recreational areas. The behavioral standards formed during adolescence are significantly influenced by modern communication technologies (media, internet, gadgets, etc.). Vytautas Zalus notes that new technologies are especially attractive to adolescents. They *"seem to separate youth from the older generation and become a unique form of communication and language"* (Zalus, 2012).

The essence of self-identification lies in understanding oneself as a whole during the process of defining one's cultural identity. This process often takes the form of either full or partial identification with a certain culture (mass, classical, confessional, etc.), or, conversely, in cases of subculture development (identification by opposition), it is based not on commonality but on the rejection of established cultural norms.

Thus, adolescent cultural identification is often transitional, when identity is not rooted in the immediate environment but instead seeks new forms (the so-called "generation gap"). Adolescents *"observe, analyze, and critically use sound and visual information more actively"* (Zalus, 2012).

N. Mirazanashvili notes that practical observation of the behavior, actions, and judgments of modern adolescents shows that their experience and knowledge of art are limited and unsystematized, and their evaluation of artworks tends to be based solely on immediate impressions (Mirazanashvili, 2012).

He emphasizes that accurate evaluation of a work of art requires practical experience. To form an adequate evaluative judgment, an adolescent must be exposed to various artistic directions and possess a certain level of knowledge. An adolescent's assessment of an artwork is grounded in their moral-aesthetic value orientations.

Therefore, engagement with music – especially learning to play the guitar – provides practical experience in interacting with art, which allows for the development of the adolescent's moral and aesthetic values. The more diverse and high-quality the repertoire, the stronger its influence on the adolescent's value orientations.

Mass media and various forms of mass culture have recently become a dominant influence on the formation of value systems, behavioral styles, and attitudes among adolescents. Among this age group, there has been a noticeable decline in the importance placed on moral and aesthetic values. For many, the value of folk and spiritual art, as well as classical national artworks, is unjustifiably diminished. At the same time, adolescents show interest in mass culture and avant-garde art, which serve as stimuli for sociocultural values.

Active involvement in various forms of art, especially learning to play musical instruments, helps form positive value orientations, stimulates cognitive and creative activity, enhances the development of individual abilities, and assists adolescents in adapting to their social environment. With increased cognitive activity, intellectual growth, and accumulated experience – especially through musical education – an adolescent becomes more capable of resisting negative influences while seeking and choosing constructive ones. They gradually develop the ability to objectively and adequately evaluate situations and make informed choices regarding values and types of activity.



## 5. Results of the study

The Selection and Implementation of Methods and Means for Adolescent Development and the Formation of Their Value Structure Should Primarily Take into Account the Following Factors:

adolescence is a transitional, complex, challenging, and critical stage that, at the same time, holds crucial importance in shaping an individual as a personality.

adolescents exhibit high levels of activity and independence, yet often lack self-criticism and the experience to foresee the long-term consequences of their actions.

the formation of value orientations is most effective when adolescents are actively and consciously fulfilling their social roles (as family members, students, and citizens). However, the degree of their involvement in all forms of public activity must be determined with regard to their actual capabilities at this developmental stage.

Music as a Powerful Tool in the Formation of Adolescents' Moral and Aesthetic Values. Musical art is a powerful means of shaping the moral and aesthetic values of adolescents. It is one of the most potent sources of emotional influence. Familiar or new situations depicted through artistic means emotionally stimulate adolescents, sometimes awakening certain needs in them for the first time. Through empathy, they may emotionally experience the beauty of nature, the power of love, the tragedy of betrayal, and more.

In art, the objects (phenomena, processes, situations) that emotionally move adolescents are not only portrayed but also revealed in depth, showing their cause-and-effect relationships – be it with historical events, social interactions, human actions, or personal qualities. Tracing these connections between emotionally significant events and their underlying causes helps these causes gain indirect motivational significance, which lies at the core of art's educational impact.

## 6. Conclusions

Thus, the moral and aesthetic parameters of value orientations are the ethical and aesthetic norms that are both socially recognized and internalized by the individual. These norms form part of the personal value system and serve as the basis for evaluating reality within the context of social and cultural activity. During adolescence, value orientations begin to be assessed not only through emotional responses but also through evaluative judgments. At this stage, a person's cultural identification often takes on a transitional, evolving character – one in which identity no longer relies solely on immediate surroundings but instead seeks new forms. Musical art, particularly learning to play a musical instrument, is an effective means of shaping an individual's moral and aesthetic value orientations. It facilitates the development of students' abilities and introduces them to the accumulated human experience, universal interests, aspirations, and ideals.

## References

1. Bekh, I. D. (2012). *Refleksyvno-eksplitsytnyi metod u vykhovanni osobystosti [Reflexive-explicit method in spiritual specialties]*. *Ridna shkola.* № 12, Pp. 3–7. [in Ukrainian]
2. Chzhan, Hui (2022). *Estetychnyi rozvytok starshoklasnykiv v umovakh dytiachoi muzychnoi shkoly [Aesthetic development of high school students in a children's music school]* *Sumskyi derzhavnyi pedahohichnyi universytet imeni A. S. Makarenka, Sumy.* 252 p. Retrieved from: <https://repository.sspu.edu.ua/handle/123456789/13077> [in Ukrainian]

3. Duman, N. (2024). *EXPLORING MUSICAL IDENTITY DEVELOPMENT: PERSPECTIVES OF STAGE THEORY, SELF-DETERMINATION THEORY, AND LIFESPAN APPROACH*. *Balkan Muzik Ve Sanat Dergisi*. <https://doi.org/10.47956/bmsd.1463953> Retrieved from: [https://www.academia.edu/125739810/EXPLORING\\_MUSICAL\\_IDENTITY\\_DEVELOPMENT\\_PERSPECTIVES\\_OF\\_STAGE\\_THEORY\\_SELF\\_DETERMINATION\\_THEORY\\_AND\\_LIFESPAN\\_APPROACH](https://www.academia.edu/125739810/EXPLORING_MUSICAL_IDENTITY_DEVELOPMENT_PERSPECTIVES_OF_STAGE_THEORY_SELF_DETERMINATION_THEORY_AND_LIFESPAN_APPROACH)
4. Haidukevych, K. A. (2011). *Moralno-estetychni tsinnosti v dukhovnii kulturi suchasnoi ukrainskoi molodoi simi [Moral and aesthetic values in the spiritual culture of the current Ukrainian young family]*. Kyiv, 22 p. [in Ukrainian]
5. Hajdu, G. and Sik, E. (2020). *Age, Period, and Cohort Differences in Work Centrality and Work Values*. *Youth Studies - Values, Practices and Discourses on Generations*, Pp.49–80. Retrieved from: [https://www.academia.edu/42579546/Age\\_Period\\_and\\_Cohort\\_Differences\\_in\\_Work\\_Centrality\\_and\\_Work\\_Values](https://www.academia.edu/42579546/Age_Period_and_Cohort_Differences_in_Work_Centrality_and_Work_Values)
6. Hrytsiuta, O. F. (2021). *Vykhovannia moralnykh tsinnosti u pidlitkiv v umovakh litnykh taboriv vidpochynku [The inculcation of moral values from children in the minds of summer camps is completed]*. Kyiv, 268 p. Retrieved from: <https://snu.edu.ua/wp-content/uploads/2022/05/Grytsiuta-O.F.-dysertatsiya.pdf> [in Ukrainian]
7. Kant, I. (2000) *Krytyka chystoho rozumu [Criticism of pure reason] / Per. z nim. ta prymit. I. Burkovskoho*. Kyiv, Yunivers, 504 p. Retrieved from: [https://shron1.chtyvo.org.ua/Kant-Immanuel/Krytyka\\_chystoho\\_rozumu.pdf](https://shron1.chtyvo.org.ua/Kant-Immanuel/Krytyka_chystoho_rozumu.pdf)
8. Mirazanashvili, N., (2012). *Pedagogical Problem in Development of Artistic Taste via Fine Arts in Teenagers* *International Journal for Cross-Disciplinary Subjects in Education (IJCDSE)*, Volume 3, Issue 4, December Retrieved from: [https://www.academia.edu/71083703/Pedagogical\\_Problem\\_in\\_Development\\_of\\_Artistic\\_Taste\\_via\\_Fine\\_Arts\\_in\\_Teenagers](https://www.academia.edu/71083703/Pedagogical_Problem_in_Development_of_Artistic_Taste_via_Fine_Arts_in_Teenagers) [in Georgia]
9. Nitsshe, F. (2002). *Po toi bik dobra i zla. Henealohiia morali [Beyond Good and Evil / On the Genealogy of Morality]* Per. z nim. A.Onyshko, Lviv: Litopys., 320 p. Retrieved from: [https://shron1.chtyvo.org.ua/Nietzsche\\_Friedrich/Po\\_toi\\_bik\\_dobra\\_i\\_zla\\_Henealohia\\_morali.pdf](https://shron1.chtyvo.org.ua/Nietzsche_Friedrich/Po_toi_bik_dobra_i_zla_Henealohia_morali.pdf)
10. Padalka, H. M. (2008). *Pedahohika mystetstva (Teoriia i metodyka vykladannia mystetskykh dysyplin) [Art Pedagogy (Theory and methodology of teaching art disciplines)]* / Kyiv, Osvita Ukrainy., 274 p. [in Ukrainian]
11. Paris, P. (2021). *The Aesthetics of Ethics: Exemplarism, Beauty, and the Psychology of Morality*. *Journal of Value Inquiry*. Pp.601-625 Retrieved from: [https://www.academia.edu/110854567/The\\_Aesthetics\\_of\\_Ethics\\_Exemplarism\\_Beauty\\_and\\_the\\_Psychology\\_of\\_Morality&nav\\_from=e5d9e8b3-0791-4f79-b068-fccb4c4c6f88&rw\\_pos=undefined](https://www.academia.edu/110854567/The_Aesthetics_of_Ethics_Exemplarism_Beauty_and_the_Psychology_of_Morality&nav_from=e5d9e8b3-0791-4f79-b068-fccb4c4c6f88&rw_pos=undefined)
12. Pecheniuk, M. A., Priadko, O. M., Vatamaniuk, H. P. ta in.(2014). *Aktualni pytannia estetychnoho vykhovannia molodi zasobamy muzyky [Current issues of aesthetic education of youth through music]: monohrafiia*. Kamianets-Podilskyi: Vydavets PP Zvoleiko D. H., 200 p. [in Ukrainian]
13. Rudnytska, O. (1997). *Mystetstvo u konteksti rozvytku dukhovnoi kultury osobystosti [Art in the context of the development of the spiritual culture of the individual]*. *Khudozhnia osvita i problemy vykhovannia molodi: zb. nauk, statei*. Kyiv, Minosvity Ukrainy, UZIMN., Pp. 3–11. [in Ukrainian]
14. Sartr, J.-P. (2022). *Ekzystentsializm – tse humanizm [Existentialism is humanism] / Zhan-Pol Sartr // Psykholohiia i suspilstvo. № 2*. Pp. 49-65. Retrieved from: <http://dspace.wunu.edu.ua/handle/316497/52461>
15. Schopenhauer, Arthur (2014). *The World as Will and Representation*, Retrieved from: <http://loveread.ec/contents.php?id=87372>

16. Strohal, T. Yu. (2018). *Formuvannia emotsiino-estetychnoho dosvidu pidlitkiv na urokakh muzyky [Formation of emotional and aesthetic experience of adolescents in music lessons]*. Kyiv: NPU im. M.P.Drahomanova.. 228p. Retrieved from: <https://uacademic.info/ua/document/0418U000596> [in Ukrainian]
17. Tokareva, N., Shamne, A., Makarenko, N. (2014). *Сучасний підліток у системі психолого-педагогічного супроводу [Modern teenager in the system of psychological and pedagogical support]: Kryvyi Rih. 312 p. Retrieved from: <https://elibrary.kdpu.edu.ua/bitstream/0564/1760/1/%D0%BF%D1%96%D0%B4%D0%BB%D1%96%D1%82%D0%BE%D0%BA.pdf> [in Ukrainian]*
18. Zalus, V. (2012). *Music and new technologies as specific language of teenagers. American Academic & Scholarly Research Journal*. Retrieved from: [https://www.academia.edu/110090856/Music\\_and\\_new\\_technologies\\_as\\_specific\\_language\\_of\\_teenagers](https://www.academia.edu/110090856/Music_and_new_technologies_as_specific_language_of_teenagers)
19. Ziazun, I. A., Myropolska, N. Ye., Khliebnikova, L. O. ta in. (1998). *Vykhovannia estetychnoi kultury shkoliariv: navch. Posib [Inspiration of the aesthetic culture of schoolchildren]*. Kyiv: IZIMN, 153 p. [in Ukrainian]

## MEDIALOGY IN MODERN KNOWLEDGE: PROFESSIONAL PERCEPTION AND DEVELOPMENT PROSPECTS

**Ievgeniia Kyianytsia**

Ph.D. in Social Communication, Associate Professor,  
Associate Professor at the Department of Journalism and Advertising,  
State University of Trade and Economics, Ukraine  
e-mail: y.kyyanytsya@knute.edu.ua, orcid.org/0000-0002-9629-9865

### Summary

The article offers an interdisciplinary analysis of scholarly approaches to understanding media reality, situated at the intersection of humanitarian, social, technological, and communication knowledge. It outlines research domains that may serve as an intellectual foundation for the development of medialogy as an integrative metatheory. Particular attention is given to the reconfiguration of medialogy's core subject area, which entails an expansion of its conceptual framework and categorical apparatus in response to the challenges of the digital age. The theoretical insights are complemented by an empirical component – an online survey of Ukrainian media professionals – whose results revealed both a fragmented understanding of the term medialogy and a clear demand for greater professional awareness in media literacy, media hygiene, media deontology, and media psychology. These findings have informed the author's interpretation of medialogy as a multilevel system of knowledge that unites analytical reflection with practical applicability, functioning simultaneously as a tool for critical media analysis and as a resource for fostering responsible media practices on both global and individual levels.

**Key words:** media, science, practice, metatheory, media literacy, media deontology, media hygiene, media ethics.

DOI <https://doi.org/10.23856/6904>

### 1. Introduction

The relevance of medialogy in contemporary scientific discourse is driven by the growing need for a comprehensive understanding of the profound transformations within media reality, unfolding in the context of digital hybridity, post-truth, and information redundancy. As a transdisciplinary scientific construct, medialogy emerges at the intersection of humanitarian, social, technological, and communication domains, offering not only tools for analyzing media texts and communicative practices, but also a theoretical framework for modelling the meanings that shape the functioning of today's communication environment. In this regard, medialogy is increasingly asserting itself as a metatheoretical paradigm that integrates philosophical, cultural, sociological, linguistic, psychological, economic, legal, and information-communication approaches, providing a holistic and systematic analysis of the transformational dynamics within the modern media landscape. It is precisely this interdisciplinary depth that grants medialogy the potential to serve as a new type of intellectual instrument – capable not only of elucidating the complex nature of media as agents of meaning-making, but also of shaping an ethically grounded, critically engaged, and socially responsible media reality.

Another key challenge that underscores the need to establish medialogy as an integrative metatheory is the structural disconnect between the theoretical comprehension of media

processes and their practical application – an imbalance that hinders the effective transfer of academic knowledge into the realm of professional media practice. The prevailing perception of media studies as a domain detached from real-world implementation limits its capacity to offer meaningful methodological support to specialists in digital communications. Within this context, the conceptualization of medialogy aims not only to provide an interdisciplinary understanding of media as institutionalized socio-cultural structures, but also to enhance the applicability of scholarly insights to contemporary media practice. Its integration into the operational field of media activity may foster the development of adaptive strategies for industry growth and enable the cultivation of a new culture of professional reflection – bridging theoretical frameworks with technological challenges that are relevant to both seasoned practitioners and emerging researchers.

To ensure both a deeper theoretical understanding of medialogy and its further conceptualization and integration into the professional environment, it is essential to draw on existing scholarly work in the field. Among the most insightful and promising contributions are those by researchers such as M. Grabe and J. Myrick, P. Dahlgren, S. Davis, K. Lundby, K. Hickethier, A. Hill, and T. Flew. Notably, the study *Informed Citizenship in a Media-Centric Way of Life* by Maria E. Grabe and Jessica G. Myrick highlights the significance of integrating visual knowledge and affective components into the structure of modern media society. The authors argue that the fusion of emotional and cognitive elements in communication practices not only aligns with scientific reasoning but also expands the scope of medialogy as both a theoretical and practical paradigm (Grabe & Myrick, 2016: 437). This approach enables the operationalization of complex phenomena such as informed citizenship, empathetic engagement in social processes, and moral reflection on media content, thereby significantly enhancing the heuristic potential of media studies.

In Ukrainian scientific discourse, the formation of the medialogical core is based on the work of M. Butyrina, O. Volosheniuk, N. Zrazhevska, V. Ivanov, T. Ivanova, L. Naidenova, V. Rizun, O. Semenets, V. Teremko, O. Habiuk, V. Tsymbaliuk, L. Shevchenko and other researchers who have made significant contributions to the study of media literacy, media economics, media law, media linguistics, media psychology, media culture, and media reality. Despite the thematic and methodological diversity, these approaches are united by a shared epistemological orientation: the understanding of media as a complex socio-cultural phenomenon. This unity not only highlights the integrative potential of medialogy as a metatheoretical approach but also affirms its status as an effective analytical and practical framework for reflecting on and improving contemporary media practices.

In the context of the theoretical framework developed by researchers across various fields, medialogy also emerges as a necessary foundation for the formation of responsible media practice. Given the growing role of consumers in shaping media reality, it is essential to reconsider the professional responsibility of media actors within the digital environment. Participants in the modern media process are not merely citizens of nation-states, but fully-fledged *media citizens* actively engaged in constructing digital space, supporting democratic initiatives, and fostering cultural interaction (Hartley, 1996: 78). Under these conditions, media professionals should not only deepen their expertise through media studies, but also take a leading role in promoting the principles of media literacy, ethics, and information hygiene – efforts that, in turn, will enhance both the quality of professional activity and the overall health of the media environment.

Thus, to substantiate medialogy as a full-fledged scientific discipline with distinct applied potential, it is essential to undertake a thorough analysis of its subject core – an effort that will

make it possible to clearly define its methodological boundaries and functional role within the structure of modern media communication.

## 2. Reconfiguration of the subject core of medialogy

The reconfiguration of the subject core of medialogy arises from large-scale transformations in communication processes, which permeate all spheres of social life and define the key parameters of media society. It is important to highlight that these changes are not solely driven by the activities of traditional social elites, but also by the active involvement of creative communities, intellectuals, alternative cultural environments, and even marginalized groups, whose influence on the formation of cultural narratives continues to grow. This results in content that may not always align with established criteria of relevance, yet gains legitimacy in the public sphere. The reconfiguration of symbolic influence challenges classical models of media production, necessitating a comprehensive analysis of media systems in a globalized communication environment. In this context, medialogy emerges as a multidimensional metatheory that transcends classical concepts, particularly those articulated by R. Debray in *Introduction à la médiologie*, where media were primarily seen as channels of meaning transmission (Debray, 2000: 29). Today, however, media are regarded as active agents in socio-cultural processes, capable of constructing social narratives, transmitting social codes, shaping collective perceptions, and directing public opinion. This shift underscores the importance of «communication» – a fundamental component of the medialogical approach.

Communication, deriving from the Latin *commūnicō* («to make common», «to unite»), has historically functioned as the primary mechanism of social interaction aimed at creating a shared semantic space (Melnychuk, 1985: 48). Over time, its conceptual meaning has evolved significantly: from a simple exchange of messages to the recognition of communication as a complex symbolic activity. In this process, not only the transmission of information but also the collective creation of meaning through sign and semiotic systems has become pivotal. The work of C. Cooley, who emphasized communication as the foundation of social integration (Cooley, 1953: 158), and J. Habermas, who viewed it as essential to civil society (Habermas, 1985: 67), illustrates that communication is not merely a technical process of data transmission, but rather a profound social practice that structures patterns of interaction between individuals and communities. Today, the understanding of communication encompasses a multilayered network of interpersonal, cultural, institutional, and global processes through which ideas, meanings, and norms circulate, reflecting the intricate dynamics of technological progress and social evolution. Its scientific examination draws on diverse disciplines – philosophy, linguistics, psychology, sociology, and cultural studies – which collectively provide a comprehensive theoretical framework for this phenomenon. From ancient rhetorical traditions to the study of digital communications, communication has consistently been the focus of profound intellectual analysis. However, in the contemporary context, its core characteristics are increasingly intertwined with the concept of media. Technological advancements not only alter the channels through which messages are transmitted, but also reshape the very nature of information exchange, giving rise to new ways of constructing social reality within the media environment – an environment that has become a central space in contemporary socio-cultural existence.

The concept of «media», derived from the Latin *medium*, has evolved from a simple description of channels for information transmission to a complex mechanism of social communication that ensures the preservation, dissemination of knowledge, and the formation of public discourse. From the earliest forms of meaning transmission – such as sign language



and cave paintings – to contemporary digital platforms, the development of media has consistently mirrored society's need to create a shared information space. Today, the media integrate various forms of communication – verbal, non-verbal, visual, and symbolic – and serve as key agents of global interaction, transcending geographical and cultural barriers. In this context, as R. Jensen observes in his concept of the «society of the imagination», modern media not only address informational needs but also prioritize emotional and symbolic meanings that shape collective perceptions, values, and identities within communities (*Jensen, 2001: 97*). Simultaneously, under current Ukrainian legislation, the media are defined as means of disseminating mass information in any form, periodically or regularly published under editorial control and a permanent name (*Law of Ukraine «On Media»*). This definition highlights the organised, institutional nature of the media as a crucial component of the information environment. Thus, the concept of media in modern conditions combines both the historical and cultural process of their evolution and clear legal regulation that ensures a balance between freedom of information and responsibility for its content.

Information, therefore, also becomes a fundamental element of the mediological core, as it shapes the content of communication processes within the context of social interaction. In the classical model of C. Shannon and W. Weaver, information is understood as the reduction of uncertainty in message transmission, a concept that remains relevant for the technical analysis of communication systems (*Shannon, Weaver, 1949: 75*). However, from a broader perspective, information is viewed as both the process and the outcome of transforming knowledge, signals, and messages into meaningful units that resonate with individual and collective consciousness. In this regard, information is not merely a neutral transmitter of facts, but a dynamic mechanism for socializing knowledge and creating meanings that influence social norms, values, and identities. In particular, M. Castells highlights that in the information society, information itself becomes the primary resource for production, power, and cultural construction (*Castells, 1996: 325*). In the mediological context, information's role extends beyond simply organizing data transmission; it also defines the discursive framework for public discourse, establishes hierarchies of knowledge, and influences the structuring of social narratives. Therefore, the analysis of information within mediology should encompass not only the technical parameters of its circulation, but also the processes of semiotic interpretation, social consolidation, and political instrumentalization. It is through information that meaning-making occurs, shaping the contours of contemporary socio-cultural space.

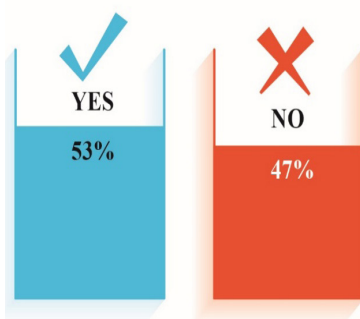
Another crucial component of the substantive core of mediology is the meanings that shape the processes of forming individual and collective consciousness. In contemporary humanities, these meanings are regarded as fundamental structural elements of cultural and social reality, guiding perception, interpretation, and action. P. Ricoeur, in his theory of narrative identity, emphasized that meanings organize our understanding of the world by integrating events into coherent narratives that construct both personal and group identities (*Ricoeur, 1984: 96*). In the context of a media society, meanings are shaped through the interaction of media technologies, communication strategies, and social expectations, with cultural codes and audience contexts playing a pivotal role in the interpretation process. The media are not merely a means of transmitting information; they are also a mechanism for crystallizing meanings within the public sphere, transforming these meanings into an active arena for struggles over interpretation, legitimation, and the hegemony of knowledge. In today's information environment, meanings are the primary resource for creating social reality, determining which interpretations of events gain social legitimacy, which identities are embedded in collective memory, and which semantic horizons open up for the further development of society.

The reconfiguration of the subject core of media studies is crucial in the context of contemporary media production, as it enables a more precise understanding of the interaction between media, information, communication, and meanings as active agents in shaping social reality. In applied media practice, this process involves expanding professional consciousness, as a deeper understanding of the underlying mechanisms of media influence on society enhances the quality of content, accountability in meaning-making, and the capacity to engage with diverse audiences. The involvement of media practitioners in the development of medialogy is essential, as their direct experience in creating and distributing media products allows them to refine theoretical approaches in alignment with the real dynamics of communication. Such collaboration will not only enrich media theory but also strengthen the social role of media as agents in the development of civil society.

### 3. Medialogy in the system of professional knowledge: awareness, significance, prospects

To assess media professionals' awareness of the metatheory of medialogy and its core components, a detailed online survey was conducted using the Computer Assisted Web Interviewing (CAWI) method, hosted on the website of the Ukrainian Media Institute. The questionnaire, developed using Alchemer software, was distributed via the link <https://s.polls.team/s3/medialogy>, allowing each respondent to complete the survey only once. The use of unique access codes ensured precise tracking and reinforced the reliability of the data collected. The sample was drawn based on statistical data from the National Council of Ukraine on Television and Radio Broadcasting regarding the number of registered media outlets. In total, 131 individuals participated in the survey, resulting in a maximum margin of error of 10%. The statistical error ranged from 1.6% to 8.0%, indicating a high degree of data accuracy. To further ensure the reliability and validity of responses, Cint software was employed to monitor key parameters such as completion time, IP addresses, and other criteria, enhancing both the quality of the data collected and the precision of the results.

The results of the survey revealed that 53% of the 131 respondents reported being familiar with the term *medialogy*, acknowledging its relevance within the context of contemporary communication research. Conversely, 47% indicated they were unfamiliar with the concept, suggesting a certain gap in awareness among media professionals regarding the core dimensions of medialogy (Figure 1).

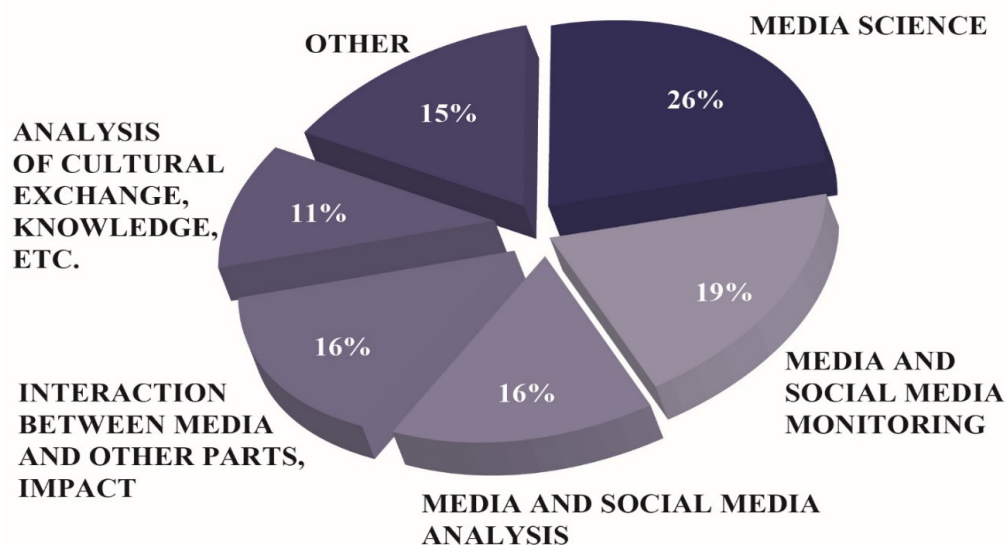


**Figure 1. Knowledge of the concept of «medialogy»**

(source: <https://s.polls.team/s3/Quota-page-medialogiya>)



The results of the survey indicated that, although medialogy is partially recognised as a distinct academic discipline, a considerable number of respondents (62 in total) demonstrated a limited understanding of its theoretical depth, heuristic potential, and interdisciplinary character. This points to a broader unawareness of medialogy as a metatheoretical paradigm that synthesises philosophical, cultural, communicative, and cognitive approaches to the study of media reality. Such a level of understanding significantly constrains the reflexive capacities of media professionals, narrows the scope for critical analysis of media processes, impedes the recognition of latent mechanisms of media influence on public consciousness, and ultimately weakens the quality of strategic communication as a vehicle for responsible public discourse. To clarify respondents' perceptions of *medialogy*, those unfamiliar with the concept were invited to respond to an open-ended question. Analysis of their answers revealed a prevailing tendency to interpret medialogy primarily as a form of academic knowledge, overlooking its conceptual function as an intellectual instrument for structuring, transmitting, and representing media messages – an instrument capable of integrating both universal and national values within today's complex media culture (Figure 2).



**Figure 2. What exactly does mediation mean (answers of 62 respondents out of 131 who answered 'yes' to the question about the concept of «medialogy»)**

(source: <https://s.polls.team/s3/Quota-page-medialogiya>)

A synthesis of respondents' answers indicates that the professional perception of medialogy within the Ukrainian media landscape remains fragmented and insufficiently structured. Many media professionals equate it with media studies as a distinct academic discipline, often reducing the concept to the systematic analysis of media processes. Others interpret medialogy primarily as an instrumental tool – for monitoring the information space, conducting content analysis, or performing operational analytics. Some respondents acknowledge its potential for exploring the interaction between media and broader social, political, and economic structures. However, the humanistic dimension of medialogy – as a metatheoretical framework for understanding media as carriers of cultural meanings, forms of knowledge, and value systems – largely

remains at the margins of professional consciousness. Accordingly, a dedicated section of the survey addressed respondents' perceptions of which components medialogy should encompass as a coherent theoretical construct, and which aspects deserve greater emphasis in its ongoing conceptual development (Figure 3).

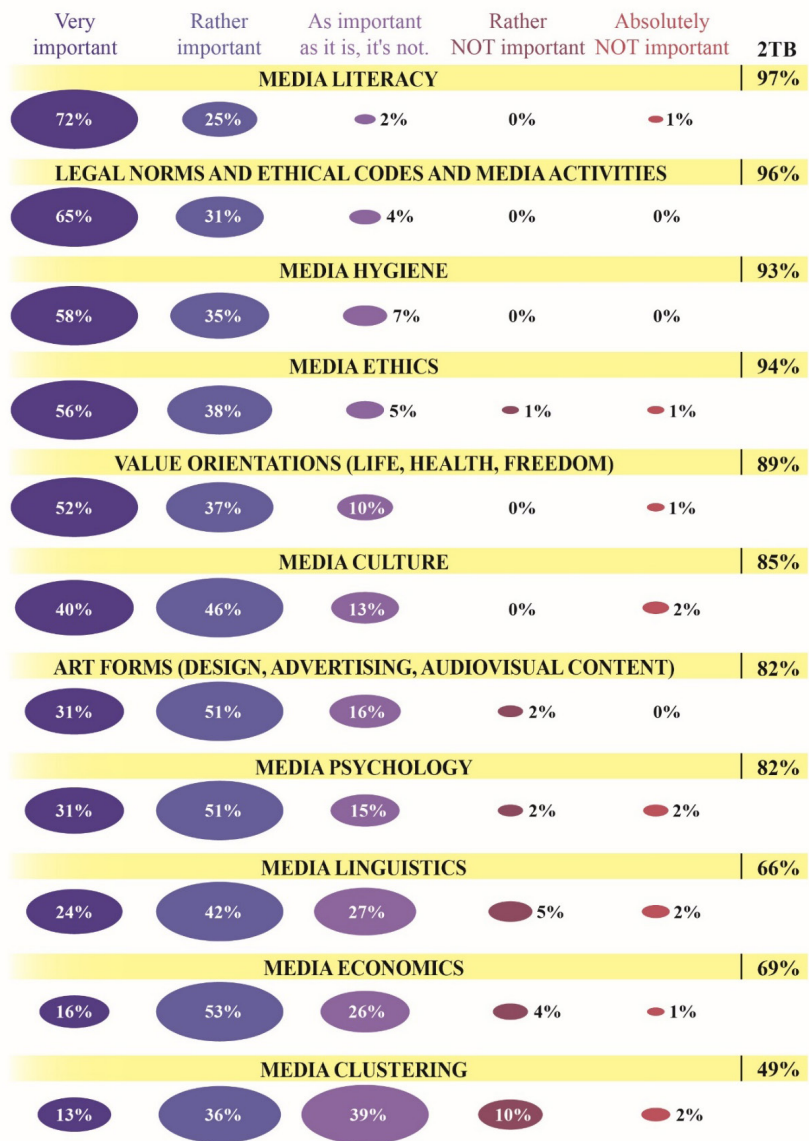


Figure 3. The importance of competence knowledge in the concept of «medialogy» (according to 131 respondents)

(source: <https://s.polls.team/s3/Quota-page-medialogiya>)

The responses indicate that media practitioners place particular emphasis on categories such as media literacy, legal frameworks, media hygiene, and media ethics, viewing them

as essential principles for fostering a responsible approach to information consumption and production. The strong support for these elements reflects a growing recognition of the need for ethical standards, critical thinking, and resilience against manipulative practices in today's communication landscape. Notably, respondents also highlighted the importance of values, cultural context, and psychological dimensions of perception, suggesting a movement toward integrating humanistic and cognitive perspectives within the metatheory of medialogy. By contrast, economic and linguistic components – despite their structural significance – were considered less central, which may point to a disconnect between the analytical understanding of the media environment and the practical realities of its operation.

The respondents identified media clustering as the least significant component, which likely reflects either limited awareness of its conceptual substance or the absence of a clearly articulated methodological framework for understanding its role in contemporary media reality. This, in turn, highlights the need for further theoretical development and refinement. Overall, the findings align with the proposed conceptual framework of medialogy, yet they call for deeper elaboration and clarification. While medialogy encompasses a substantial body of applied knowledge, its analytical efficacy depends on a robust theoretical foundation capable of offering a systematic understanding of the complex dynamics of modern media processes.

#### 4. Integrative approach in medialogy: an interdisciplinary metatheory

In the context of the rapidly evolving communication landscape, it is especially important to understand medialogy as a comprehensive metatheory that synthesises insights from the humanities, social sciences, and communication and technology studies into a coherent analytical framework capable of explaining the dynamics of media functioning in contemporary society. Such a holistic approach not only opens new avenues for the academic exploration of complex information and communication processes, but also underscores the need for a clear conceptual articulation of medialogy as a scientific category. This, in turn, provides the basis for formulating an original definition that captures its structural and functional complexity, as well as its applied relevance. Thus, *medialogy* may be defined as an interdisciplinary metatheory that integrates knowledge from a range of academic fields to analyse, optimise, and advance media practices. It encompasses media culture, media psychology, media linguistics, media education, and media semiotics, alongside technological, managerial, economic, and marketing dimensions. Medialogy examines the functioning of media systems at macro, meso, and micro levels, serving as both a theoretical and practical foundation for the effective operation of media institutions and the professional activity of media practitioners (Figure 4).



Figure 4. Author's approach to structuring the metatheory of medialogy

The understanding of *medialogy* as an interdisciplinary metatheory necessitates the integration of diverse scientific approaches, without which it is impossible to fully grasp the complex nature of contemporary media processes. Since media function simultaneously as cultural artefacts, psychological triggers, linguistic constructs, ethical practices, and economic mechanisms, their study requires a synthesis of relevant disciplinary perspectives. For example, the media-cultural approach enables us to trace how media shape social perceptions, transmit values, and codify national identity within specific cultural contexts. These contexts, in turn, directly influence the reception of media messages – an area explored within media psychology, which focuses on the cognitive processes and emotional responses of audiences. The linguistic framing of media content is analysed through media linguistics, which investigates how the media represent social meanings and sustain dominant narratives through discursive structures and semantic patterns. These meanings, in turn, are subject to critical re-evaluation within the framework of *media education*, which cultivates the public's capacity for informed and conscious information consumption. The ethical boundaries and norms of professional responsibility within which media activity takes place are delineated by *media deontology*, while *media semiotics* enables the interpretation of media as sign systems operating within complex interrelations with political, social, and cultural structures. Within this interdisciplinary context, *medialogy* also incorporates economic and technological dimensions, examining the infrastructure of the media industry, its funding principles, marketing models, and targeting mechanisms. In this light, *media management* emerges as a practical component oriented towards optimising organisational processes, strategic planning, and effective resource allocation in a dynamic and competitive environment. It is this integrative logic that enables *medialogy* not only to grasp media phenomena in both theoretical depth and practical application, but also to provide a solid foundation for the regulation and development of media processes across all levels, in particular:

- at the macro-level, *medialogy* examines systemic communication processes that shape the global information landscape and define strategic trajectories of transnational influence through media instruments. Here, the circulation of symbolic capital, the establishment of ideological paradigms, and the legitimization of geopolitical narratives within international discourse become central. Global media corporations, such as *Al Jazeera*, *China Global Television Network*, and *Reuters*, function not only as information providers but also as agents of influence, shaping perceptions of political events, social conflicts, or cultural divisions from the perspective of specific media centres. For example, the portrayal of migration processes in European or American media can vary significantly depending on editorial policies, creating alternative images of the "other" as a threat, an object of humanitarian aid, or a subject of integration. Such practices highlight the media's ability to indirectly influence political decision-making, exacerbate interstate tensions, or, conversely, initiate cultural diplomacy mechanisms. Thus, the macro-level of analysis allows us to identify not only the structural characteristics of the global media field but also the mechanisms through which power, identities, and global hierarchies are represented in the dynamics of media production and consumption;

- at the meso-level, *medialogy* focuses on the dynamics of interaction between media structures and collective actors such as regional communities, professional groups, local authorities, or culturally distinct audiences. In this context, it examines not only the structure of information dissemination at the intermediate level but also the processes of media mediation through which localized identities, group narratives, and political subjectivity are shaped. In particular, local TV companies, independent online resources, or regional press outlets often function as structural media intermediaries between the national information field

and the specificities of the regional context. For example, during natural disasters, epidemiological threats, or regional conflicts, local media serve as a crucial source of information, tailored to the specific social circumstances. Additionally, professional publications, such as trade journals for healthcare professionals, educators, or agricultural producers, help consolidate expert communities, facilitating the circulation of specialized knowledge and professional ethics. The meso-level analysis also encompasses the role of media within the structure of civil society, for instance, in the activities of trade unions, student associations, or municipal initiatives, where media communication acts as a pivotal tool for horizontal mobilization and the articulation of interests of particular social segments;

– at the micro-level, *medialogy* focuses on the study of personal media consumption practices, exploring how individuals interact with information and how media content affects their daily lives. This includes analyzing user behavior on social media platforms such as Instagram or YouTube, where individuals form emotional responses through liking, commenting, and sharing content. For instance, studying how users react to news through Instagram Stories or TikTok helps to understand the mechanisms of emotional manipulation and social identification that occur within digital platforms. In addition, influencers and bloggers, particularly those creating content in niches like health, technology, or eco-activism, can significantly influence their followers by constructing ideas and values through individualized narratives and personal stories that are subsequently transformed into collective social practices. Analyzing these individual media practices enables us to identify the mechanisms by which media alter personal perceptions, shape worldviews, and facilitate socialization within specific media ecosystems.

Thus, the integrative nature of *medialogy* opens up the possibility of a holistic, multi-level analysis of contemporary media processes, covering both global communication shifts and localized media practices, as well as individual ways of interacting with information content. This approach enables a systematic study of the structure, dynamics, and influence of media at different levels – from transnational information flows to personal communication strategies. Therefore, taking these interrelationships into account will not only allow for a deeper understanding of the functioning of the modern media space, but also foster the development of scientifically grounded approaches to its regulation and advancement.

## 5. Conclusions

The theoretical understanding of *medialogy* as a transdisciplinary metatheory has enabled a clear definition of its subject core – a complex analytical framework that integrates knowledge from the humanities, social sciences, and technology for a comprehensive understanding of media processes in modern society. This approach allows us to view the media not only as communication channels, but also as fully-fledged agents of meaning-making that shape the formation of cultural narratives, identities, and social perceptions. The gradual development of this conceptual framework has raised the question of its perception within the professional environment: how deeply do media specialists understand the content, potential, and functional role of *medialogy* as a scientific and practical category? This question naturally led the research towards the empirical dimension – conducting a survey that allowed us to gather genuine responses from representatives of the professional community, assess the level of understanding of key ideas, and identify the gaps that remain unaddressed in everyday media practice.

Thus, the theoretical substantiation of the subject field of *medialogy* has become not only a methodological prerequisite for formulating the author's definition of this concept, but also a conceptual tool for identifying its structural and functional parameters, which are manifested



in the ability to integrate humanitarian, social, technological, and communication approaches. Such an analytical framework enables us to capture the complex dynamics of modern media processes and explain the patterns of their functioning at various levels – from global strategies of information influence to localized practices of media consumption. Accordingly, this multi-level perspective not only ensures the methodological integrity of the study but also serves as a foundation for developing effective models for the development of media institutions within a transformational social context.

## References

1. Castells M. (1996). *The Rise of the Network Society*. Oxford: Blackwell. 625 p.
2. Dahlgren P., Hill A. (2020). *Parameters of Media Engagement*. *Media Theory*. Vol. 4, № 1. P. 01–32. DOI: <https://doi.org/10.70064/mt.v4i1.618> (Date of application: 23.04.2025)
3. Dawes S. (2017) *What Is Media Theory?* *Mediatheoryjournal*. Manifestos. URL: <http://journalcontent.mediatheoryjournal.org/index.php/mt/article/view/9> (Date of application: 25.04.2025).
4. Flew T. (2017). *The «Theory» in Media Theory: The «Media-Centrism» Debate*. *Mediatheoryjournal*. Manifestos. URL: <http://journalcontent.mediatheoryjournal.org/index.php/mt/article/view/17> (Date of application: 26.04.2025)
5. Grabe M. E., Myrick J. G (2016). *Informed Citizenship in a Media-Centric Way of Life*. *Journal of Communication*. Vol. 66, № 3. P. 435–455. DOI: 10.1111/jcom.12215 (Date of application: 27.04.2025)
6. Habermas, J. (1985). *Moral consciousness and communicative action*. Barcelona: Península. 432 p.
7. Hartley J. (1996). *Popular Reality: Journalism, Modernity, Popular Culture*. London: Arnold. 276 p.
8. Hickethier K. (2010). *Mediatisierung und Medialisierung der Kultur*. In Hartmann M., Hepp A. (eds). *Die Mediatisierung der Alltagswelt*. VS Verlag für Sozialwissenschaften. URL: [https://link.springer.com/chapter/10.1007/978-3-531-92014-6\\_6](https://link.springer.com/chapter/10.1007/978-3-531-92014-6_6) (Date of application: 10.04.2025).
9. Hill A. (2018). *Media Experiences: Engaging with Drama and Reality Television*. London: Routledge. 236 p.
10. Jensen R. (2001). *The Dream Society: How the Coming Shift from Information to Imagination Will Transform Your Business*. McGraw-Hill Education. 270 p.
11. Kooley Ch. H. (1953). *The Significance of Communication*. Reader in public opinion and communication / Ed. Berelson V., Yanowitz M. USA : N.Y. 287 p.
12. Lundby K. (2009). *Mediatization: Concept, Changes, Consequences*. New York : Peter Lang. 316 p.
13. Melynychuk, O. S. (Ed.). (1985). *Etymolohichnyy slovnyk ukrayinskoyi movy Naukova Dumka*. Vol. 2, p. 48 [In Ukraine]
14. Ricoeur P. (1984). *Time and Narrative*. Chicago: University of Chicago Press. 287 p.
15. Shannon C. E., Weaver W. (1949). *The Mathematical Theory of Communication*. Urbana: University of Illinois Press. 131 p.



## STYLISTIC DEVICES OF INDIRECT ACTUALIZATION OF THE CONCEPT OF TRAUMA IN ELIZABETH STROUT'S NOVEL "OLIVE KITTERIDGE"

**Yuliia Mamai**

Postgraduate Student, Zaporizhzhia National University, Ukraine

e-mail: [juliiamam@gmail.com](mailto:juliiamam@gmail.com), [orcid.org/0000-0001-7587-3672](https://orcid.org/0000-0001-7587-3672)

### Summary

The article is devoted to the analysis of stylistic devices used for the indirect actualization of the concept of TRAUMA in Elizabeth Strout's novel "Olive Kitteridge". The focus of the research is on metaphors, similes, personifications, epithets, metonymies, oxymorons, and other stylistic means by which the author conveys the psycho-emotional state of the characters. Particular attention is paid to the descriptions of bodily reactions, somatic manifestations, emotional outbursts, and the interaction between humans and nature. This mode of actualizing the concept of TRAUMA reveals the inner pain and psychological crises experienced by the characters. Through the use of artistic tropes, Elizabeth Strout succeeds in depicting the dynamics of emotional traumatization: from physical pain to the loss of identity, from fear to alienation. The detailing of psychosomatic symptoms, behavioral disturbances, and associations with natural processes creates a profound depiction of psychological suffering. The indirect actualization of traumatic experience through stylistic devices in the novel enhances its artistic effect, allowing the reader to immerse themselves in the inner world of the characters and perceive the multidimensionality of their experiences. The article demonstrates that stylistic devices function not only as aesthetic elements within the novel but also as significant tools for the cognitive representation of psychological trauma. The analysis confirms that traumatic experience in "Olive Kitteridge" is embodied through multilayered linguistic structures that require a comprehensive interpretative approach.

**Key words:** emotional trauma, cognitive linguistics, stylistic devices, metaphor, somatic symptoms, psycho-emotional state, indirect representation.

DOI <https://doi.org/10.23856/6905>

### 1. Introduction

In contemporary research, the phenomenon of trauma is examined within an interdisciplinary context – at the intersection of psychology, literary studies, psychoanalysis, and sociology. Scholars such as Cathy Caruth, Dominick LaCapra, and Kalí Tal have analyzed trauma through narrative structures and collective memory, emphasizing the importance of literature as a medium for recording traumatic experience (*Berger, 1997*). Within the psychoanalytic paradigm, Philip M. Bromberg proposed a relational model of trauma experience, focusing on the phenomenon of dissociation in post-traumatic states (*Bromberg, 1993*). The biological mechanisms of post-traumatic disorders were presented in the research of Dennis S. Charney, who concentrated on physiological changes in the body under severe stress (*Charney, 1993*). The issue of individualism and its impact on the social adaptation of individuals with traumatic experience was initiated in the works of Louis Dumont (*Dumont, 1986*). Meanwhile, Susan Guaccero, analyzing the character of Olive Kitteridge, offers a psychoanalytic interpretation of the space of personal ruptures and transformations (*Guaccero, 2010*).

Literary representations of trauma in American prose of the post-9/11 period have been thoroughly studied by Rae-Lee Kruger (*Kruger, 2016*), while age-related changes and aging as components of traumatic experience are explored in the work of Jelena Šesnić (*Šesnić, 2019*). The psychosomatic consequences of traumatic events have been systematized in a meta-analytic review by M. L. Pacella and co-authors (*Pacella et al., 2013*).

Particular attention is also given to the study by Arie Y. Shalev, who analyzes the connection between post-traumatic stress disorder and depression in victims of psychological trauma (*Shalev et al., 1998*). The philosophical aspects of the search for meaning in life and the impact of traumatic experience on the psyche are explored in the works of Rollo May (*May, 2009*) and Erich Fromm (*Fromm & Anderson, 2013*).

The issue of psycho-emotional trauma in Elizabeth Strout's novel "Olive Kitteridge" is actively discussed in contemporary scholarly research. In particular, Qiu Minghui analyzes the manifestations of the protagonist's traumatic experience, exploring aspects such as the symptoms of trauma, their causes, and the possibilities for recovery (*Qiu Minghui, 2023: 166–167*). The novelty of the topic in this article lies in its focus on the indirect stylistic actualization of the concept of TRAUMA in "Olive Kitteridge", which has not yet received systematic analysis within Ukrainian linguistics. The relevance of this study is determined by the growing interest in the investigation of cognitive mechanisms of trauma verbalization and the role of literary tropes in representing complex psycho-emotional states of characters.

The aim of the study is to identify and analyze the indirect stylistic devices (metaphors, comparisons, personifications, epithets, metonymies, and other tropes) that represent the concept of TRAUMA in the novel "Olive Kitteridge".

To achieve this aim, the following objectives are set:

- to identify the main stylistic mechanisms of the indirect actualization of traumatic experience;
- to trace the cognitive nature of stylistic devices in the context of literary text;
- to analyze the semantics (the meaning of words or described situations related to physical or emotional pain) and pragmatics (the way in which images influence the reader) of images associated with bodily and emotional suffering.

The methodological basis of the study includes methods of cognitive analysis, contextual analysis, as well as elements of stylistic and semantic analysis. The logic of the presentation of the material is based on a sequential analysis of the literary text with a focus on identifying the stylistic devices through which the traumatic experience of the characters is represented in the novel.

## 2. Stylistic Devices for Representing Trauma

Stylistic devices play a crucial role in language and literature, enabling the conveyance of complex emotional and psychological states, particularly those associated with traumatic experiences. The use of such devices as *metaphors, personifications, comparisons, and other tropes* helps to immerse the reader more deeply into the inner world of Elizabeth Strout's novels, making the characters' experiences more tangible and comprehensible (*Kuzebna, Usyk, 2021*).

*The metaphor*, as one of the most powerful stylistic devices, allows the transfer of properties from one object to another, creating new shades of meaning (*Kobzar, 2014*). In the context of portraying trauma, **metaphors** can emphasize the intensity of pain, the sense of isolation, or the internal conflict of a character on both physical and abstract levels.

Other stylistic devices, such as *personification*, allow the attribution of human characteristics to inanimate objects or abstract concepts, which can emphasize the depth of emotional experiences. For example, the description of one heroine's state as "*the soul exhausted*

by suffering while the body continues to exist” conveys the rift between physical existence and emotional exhaustion.

For example, **the comparison of a woman to a Christmas tree** – which is cut down to be admired for a short time and then discarded – may symbolize **the objectification and devaluation of the individual**. The Christmas tree becomes a symbol of short-lived relationships, where beauty is used for temporary satisfaction and later devalued and thrown away: *For a moment she felt baffled that people did this to trees (Christmas trees) ...in a few weeks the tree would be stripped, taken down, hauled out onto the sidewalk with tinsel still sticking to it* (Ch. 3, p. 65). The comparison of a person to an object also reflects an awareness of the loss of control over one’s life and isolation, as illustrated by the image: *Transparent plastic capsule that rose off the ground* (Ch. 5, p. 119).

**The words of others** can evoke feelings of confusion and an inability to think clearly: *The woman with the long gray hair has really shaken Olive up: Seismic spells itself across her fog-colored mind* (Ch. 9, p. 222). Healthy, harmonious relationships can act as a trigger that initiates a traumatic reaction: *To love and to be loved is the most important thing in life. those words could cause such an exacerbation of the silent dread in Kevin* (Ch. 2, p. 51).

In the novels about Olive Kitteridge, there is a recurring idea that **life** consists of alternating **big and little bursts**: *Olive’s private view is that life depends on what she thinks of as big bursts and little bursts* (Ch. 4, p. 83). The **loss** of a loved one (death) is associated with **hell**: *Then, I’m in hell* (Ch. 13, p. 318).

**In relationships**, there may be a sense of coldness, a lack of emotional support, and even the presence of hostility: *He was leaning back in his chair watching her. There was no pocket of warmth* (Ch. 3, p. 68). Despite **outward friendliness (a smile)**, it is entirely possible to maintain **distance** or not truly seek close contact with others: *someone who brushed past people even when she was smiling* (Ch. 12, p. 244).

By focusing on descriptions of the physical body, a wide range of emotions, feelings, and experiences can be conveyed. Through the **body**, the author reveals sudden and intense emotional reactions and their speed: *the flash went through her; another flush of heat rows through her* (Ch. 3, p. 65); the unexpected surge of fear: *Ripple of terror went through him* (Ch. 5, p. 109). After receiving shocking news, such as a husband’s betrayal, the entire body – including the joints – can become unstable and lose its internal cohesion: *Her joints have become loosened* (Ch. 9, p. 212).

The author depicts a state of health in which the character is psychologically exhausted by suffering, while the body continues to exist: *Only soul poor. The body bangs on* (Ch. 13, p. 335). **The black mass** moving inside the body symbolizes anxiety or a depressive state: *Something stunned and fat and black moves through her* (Ch. 4, p. 86).

**The absence of expression on the face** serves as a reaction to severe trauma, shock, or distress: *Anita’s face got blank, like she couldn’t find the expression to put on it* (Ch. 10, p. 238). **Fear-related emotions** are also conveyed through facial expressions: *A small motion of fear seemed to pass over the face* (Ch. 1, p. 9). The eyes similarly reflect emotional exhaustion and depression: *Her eyes weren’t quite right* (Ch. 10, p. 230); *bleary in his eyes* (Ch. 3, p. 70). **The eyes, as a link to the outside world**, in moments of acute stress, illustrate a blurring of boundaries between reality and internal experiences: *Everything became blurry, not just her eyes* (Ch. 12, p. 286).

The physical manifestation of anxiety can resemble paralysis, where the body – specifically **the limbs and face** – reacts faster than the mind: *Hot tingles shot through Winnie’s arm and fingers* (Ch. 10, p. 244); *even her nose and chin tingled* (Ch. 7, p. 167). The skin

responds to anxiety through the appearance of perspiration: *Harmon felt a sprinkle of perspiration arrive on his forehead* (Ch. 5, p. 107).

**The heart**, being the first to react among all parts of the body, experiences emotional pain and expresses empathy: *Oh, it broke her heart* (Ch. 7, p. 160), as well as conveying tension: *her heart pumping ferociously* (Ch. 11, p. 286).

**The stomach** reflects the suddenness and sharpness of pain, indicating the psychosomatic connection between emotions and bodily sensations: *A pinprick of heat started up in her stomach* (Ch. 12, p. 303).

**Clothing details** can exert psychological pressure on the characters: *The darkness of the man's coat seemed to press against her head* (Ch. 3, p. 63).

Another group of stylistic devices is connected with **nature and the environment**, where the inner state of the characters resonates with the surrounding world, for instance, with the external emptiness and coldness of nature: *природи the streetlamps pale in the dark, cold* (Ch. 3, p. 70).

**The parallelism between nature and the emotional state** of the heroine creates a sense of emptiness, change, and inevitability: *That tulips died, the trees turned red, the leaves fell off, the trees were bare, snow came* (Ch. 8, p. 184); or, conversely, conveys a feeling of safety: *all these receded like a shoreline as he walked through the safety of his pharmacy* (Ch. 1, p. 2).

A turning point in a character's life can be a moment of heroism or empathy, when the character emerges from their own state of trauma: *staring into her open eyes in the swirling salt-filled water, with the sun flashing through each wave, he thought he would like this moment to be forever* (Ch. 2, p. 56).

**Nature** maintains a connection with **childhood memories and past experiences** through the scents of flowers and grass, and the contemplation of familiar places: *The salt air filled his nose, the wild rugosa bushes with their white blossoms brought him a vague confusion; a sense of sad ignorance seemed cloaked in their white petals* (Ch. 2, p. 36); *Relief came, arriving as a sensation beneath his ribs, like a gentle lapping of the water's edge at low tide, a comforting quiescence* (Ch. 2, p. 38); *And yet gazing back at the sun-sliced bay, he noted how familiar it felt; he had not expected that* (Ch. 2, p. 36).

**Visiting familiar places** (a forest, patches of flowers) helps to calm down and escape anxiety: *The woods were there, and that's all he wanted, to lie on the pine needles, touch the thin, ripping bark of a cedar tree, have the hackmatack needles above his head, the wild lilies of the valley with their green, open leaves near him. The hidden white starflowers, the wild violets; his mother had shown him all these* (Ch. 2, pp. 38–39).

Thus, familiar nature and its scents transport the character back to childhood memories, evoking a specific psychological state and possibly initiating the process of repressed traumatic memory.

**Emotional experiences** can resemble a **storm** that has not yet subsided: *The tide is still out on that one, she thinks* (Ch. 9, p. 216). Water symbolizes a muted emotional state, as if she is detached from reality: *By God, we do, Olive thinks. But she is stunned in her underwater way* (Ch. 4, p. 74).

The character's behavior in a state of despair is compared to that of an animal: *She wept at times with such noise the dog whimpered and trembled* (Ch. 8, p. 176).

In such descriptions, there is a contrast between the outward beauty of nature and the inner painful sensations, suppressed emotions, or feelings repressed since childhood.

The details of nature serve as a means of conveying the intensity of emotional memories, as descriptions of the natural world are interrupted by brief, poignant statements that reveal the

depth of pain, as if the trauma “breaks through” the usual flow of thought: *But the house, the trees tangled with woodbine, the surprise of a lady's sleeper in the midst of pine needles, the open leaves of the wild lilies of the valley - he missed it. He missed his mother* (Ch. 2, p. 53).

Dissociation in the characters – the process of complete immersion into an activity to avoid pain – is compared to submersion under water, where the connection with the surrounding world is lost: *She didn't know what she played, couldn't have said, but she was inside the music* (Ch. 3, p. 70); *it was like trying to make sense of music and God and why the ocean was deep. (Long ago Angie had known not to try to make sense of these things, the way other people tried to do.)* (Ch. 3, p. 64).

The stylistic device of **metonymy** is used to describe a general state of malaise: *Her legs feel swollen, not good* (Ch. 4, p. 88), or to convey a state of concentration and tension: *He had to listen with half an ear as his filled prescriptions, to make sure Mrs. Granger was not at the cash register dismissing a complaint* (Ch. 2, p. 3).

A **comparison** describes **tremor** (a physical manifestation of anxiety) as resembling the devil: *Her foot bounced like the devil* (Ch. 13, p. 333), while bodily manifestations of tension caused by internal stress are likened to a puppet: *A nervous fellow, though, Simon had been, his whole body jerking around like a puppet pulled by strings* (Ch. 2, p. 35).

The physical sensation of **sudden fright** (a sudden awareness of guilt or shame), its intensity and unexpectedness, can regress **an adult character back into a childlike state**: *She feels a jolt of panic, as if she herself have just been caught smoking in the woods* (Ch. 4, p. 84).

In the first book, there is a comparison of **men to animals**, which affects future relationship patterns through early childhood trauma related to sexuality: *There are some men in the world that when they lie down beside a woman, they are no different from dogs* (Ch. 12, p. 300).

A character suffering from **anorexia** is compared to a **spider and a seagull** to emphasize physical exhaustion: *Her legs as skinny as spider legs* (Ch. 5, p. 103), and to highlight physical fragility: *Her hand looked like the claw of a seagull* (Ch. 5, p. 116).

The feeling of **recurring painful experiences** is compared to the sky: *for Angie time was a big and round as the sky* (Ch. 3, p. 64). Emotional burden is compared to a massive boulder: *Something had been lifted like a boulder* (Ch. 5, p. 109). To intensify the depiction of pain, a heart attack is compared to a person sitting heavily on his chest: *квітці like someone had sat hard on his chest* (Ch. 7, p. 154).

The use of **personification** to convey fear, inner unrest, and emotional agitation gives these feelings human characteristics: *a soft ache beating on her breastbone for a moment, like a wind inside her* (Ch. 4, p. 78). Fatigue and disappointment, as well as a **sense of hopelessness** in the characters, are depicted as **contagious infections**: *Crazy breeds crazy* (Ch. 2, p. 49). **Sadness** is described as a **stain** that travels: *He felt the stain of some sadness make its way from her to him* (Ch. 2, p. 44). The body experiences **an emotional reaction** during communication, resembling **the prick of a needle**: *A sense of umbrage pricked him, then left* (Ch. 2, p. 38).

Loneliness is depicted as a killer, a threat to life: *She knows that loneliness can kill people – in the different ways can actually make you die* (Ch. 4, p. 83).

**Epithets** convey the grim aesthetics of death: both terrifying and lyrical: *The tender unknowingness* (Ch. 7, p. 158), waves reflecting the emotional storm within, epithets: *Winnie sat in a chair and watched the ocean, choppy and gray* (Ch. 10, p. 247). Internal disdain and the feeling of self-disgust: *it seemed to telling her he was a slob, pathetic, not a shred of dignity* (Ch. 2, p. 42).



Thus, the conceptualization of TRAUMA, the depiction of the characters' traumatic experiences, is achieved through stylistic devices in the novel "Olive Kitteridge". Through metaphors, personifications, comparisons, and other literary techniques, the author conveys the multidimensional nature of emotional and physical suffering. The indirect representation of psycho-emotional states enhances the emotional impact of the text and facilitates a deeper immersion for the reader into the inner world of the characters.

### 3. The Role of Specific Figures of Speech in Representing Traumatic States

The use of tropes adds drama and multi-layered meaning to the psychological experiences in the work. **Hyperbole** is used to represent emotional states of shock, such as: *Made you breathless, really* (Ch. 7, p. 154), and the intensity of pain, like *caused a blister the size of a big marble to appear on her sole* (Ch. 4, p. 81).

The author uses **ellipsis** to describe sudden loss, an emotional blow, when the enjoyment of beauty in the world fades due to the betrayal of a loved one: *The loveliness of all things – all gone* (Ch. 7, p. 168).

**Neologisms** enhance the philosophical aspect of vulnerability and the fragility of life, while the **oxymoron** combines the harshness of the reality of death with the poetic beauty seen by the observer: *The tender unknowingness, the goneness of his flung-wide arms, his belly showing* (Ch. 7, p. 158).

Emotional transference, trauma linked to past experiences, is described through **allegory**: *there was a water terror that had to do with her mother* (Ch. 3, p. 63).

Elizabeth Strout uses **antithesis** to convey complex emotions and inner conflict through sincere, emotionally charged statements: *. I haven't wanted to be this way, but so help me, I have loved my son* (Ch. 4, p. 87).

In the first book, there is an **allusion** to Shakespeare, reflecting the bitter acceptance of old age: *Seven stages of life? Is that what Shakespeare said? Why, old age alone had seven stages!* (Ch. 11, p. 280).

Thus, hyperbole, ellipsis, oxymoron, allegory, antithesis, and allusion are essential for Elizabeth Strout in conveying emotional depth, internal contradictions, and the philosophical dimension of her characters' suffering.

### 4. Conclusions

The conducted research shows how important stylistic devices of indirect actualization are for depicting the psycho-emotional states of the characters in Elizabeth Strout's novel "Olive Kitteridge". Metaphors, comparisons, personifications, epithets, and hyperboles are the most frequently used tools that, through imagery and bodily associations, allow for the portrayal of complex emotional reactions of the body, somatic manifestations of anxiety, fear, pain, and feelings of loneliness. Metaphors and comparisons deepen the emotional experience, personifications animate internal states, epithets sharpen the emotional tone, and hyperboles convey the extraordinary intensity of traumatic feelings.

The bodily manifestations of psycho-emotional states are reduced to descriptions of the face and eyes (lack of expression, blurred vision), hands, legs, and joints (tremor, paralysis, tingling), heart (emotional pain, rapid heartbeat), stomach (sudden sharp pain), and skin (sweating due to anxiety). Through these bodily symptoms, the novel conveys shock, anxiety, fear, emotional oppression, and internal exhaustion.



Another important role in the representation of traumatic experiences is played by the descriptions of nature and the environment. The parallelism between changes in nature and the emotional state of the characters enhances themes of loneliness, loss, desolation, or, conversely, the search for protection. Nature becomes a trigger for childhood memories and repressed traumatic experiences.

Thus, the work traces a coherent system of stylistic strategies aimed at the cognitive and artistic understanding of traumatic experiences. Promising directions for further research include a more detailed analysis of the cognitive models of traumatic experience representation in Elizabeth Strout's novel "Olive, Again".

## References

1. Berger, J. (1997). *Trauma and literary theory [Review of Unclaimed Experience: Trauma, Narrative, and History; Representing the Holocaust: History, Theory, Trauma; Worlds of Hurt: Reading the Literatures of Trauma, by C. Caruth, D. LaCapra, & K. Tal]*. *Contemporary Literature*, 38(3), 569–582. <https://doi.org/10.2307/1208980>
2. Bromberg, P. M. (1993). *Shadow and substance: A relational perspective on clinical process*. *Psychoanalytic Psychology*, 10(3), 378–406.
3. Charney, D. S. (1993). *Psychobiologic mechanisms of posttraumatic stress disorder*. *Archives of General Psychiatry*, 50(4), 294–305. <https://doi.org/10.1001/archpsyc.1993.01820160064008>
4. Dumont, L. (1986). *Essays on individualism: Modern ideology in anthropological perspective*. Chicago: University of Chicago Press.
5. Fromm, E., Anderson, L. A. (2013). *The sane society*. New York: Routledge.
6. Guaccero, S. (2010). 'Standing in the spaces' with Olive Kitteridge, by Elizabeth Strout. *Psychoanalytic Perspectives*, 411–415.
7. Kruger, R.-L. (2016). *Fighting the fear: Everyday terror in the American short story collection after 9/11. A study of Jennifer Egan's A Visit from the Goon Squad and Elizabeth Strout's Olive Kitteridge*. *MacEwan University Student eJournal*, 3(1), 293. <https://doi.org/10.31542/j.muse.393>
8. May, R. (2009). *Man's search for himself*. Manhattan: W. W. Norton & Company.
9. Pacella, M. L., Hruska, B., Delahanty, D. L. (2013). *The physical health consequences of PTSD and PTSD symptoms: A meta-analytic review*. *Journal of Anxiety Disorders*, 27(1), 33–46. <https://doi.org/10.1016/j.janxdis.2012.08.004>
10. Qiu, M. (2023). *Strout's insight into the times: Trauma and recovery in Olive Kitteridge*. *International Journal of English Literature and Social Sciences (IJELS)*, 8(4), 166–173. <https://doi.org/10.22161/ijels.84.27>
11. Shalev, A. Y., Freedman, S., Peri, T., Brandes, D., Sahar, T., Orr, S. P., Pitman, R. K. (1998). *Prospective study of posttraumatic stress disorder and depression following trauma*. *American Journal of Psychiatry*, 155(5), 630–637. <https://doi.org/10.1176/a>
12. Šesnić, J. (2019). *The past and present of age and ageing in The Country of the Pointed Firs and Olive Kitteridge*. *Anafora – Časopis za znanost o književnosti*, 6(2), 443–468. <https://doi.org/10.29162/anafora.v6i2.8>
13. Strout, E. (2008). *Olive Kitteridge*. New York: Random House.

## 3D CLOTHING VISUALIZATION AS AN INNOVATIVE TOOL FOR THE FASHION INDUSTRY

**Alina Matiukhina**

CEO Limerense, Los Angeles, California, USA

e-mail: belousalinasergeevna@gmail.com, orcid.org/0009-0005-9670-9288

### Summary

The study focuses on the integration of three-dimensional (3D) visualization as an innovative tool for transforming design practices in the fashion industry. The increasing digitalization of manufacturing processes and the globalization of the economy present new challenges for the personalization of clothing. 3D design and printing technologies enable the creation of removable decorative elements, facilitating the customization of standard clothing models. *This study aims* to conduct a comprehensive analysis of the use of three-dimensional visualization as an innovative tool for transforming design practices in the fashion industry, taking into account aesthetic, technological, and socio-cultural factors. *The methodological* framework is based on an interdisciplinary synthesis of visual semiotics and the conceptual foundations of virtual materialism, enabling a multifunctional approach to the analysis of the phenomenon. Particular attention is given to the application of 3D visualization in creating virtual prototypes that allow designers to evaluate the shape, texture, and materials of future garments. This approach optimizes the design process, reduces time and material costs, and minimizes textile waste, aligning with the principles of sustainable development. The study examines the technological aspects of 3D modeling, including the use of software such as Marvelous Designer and ZBrush for developing digital patterns, sculpting surface details, and material texturing.

The analysis explores the impact of aesthetic, technological, and socio-cultural factors on the adoption of 3D technologies. Using the case of the Limerense\_com brand, the research highlights innovative approaches to producing digital clothing analogues that function as both commercial products and conceptual artifacts. The findings underscore the epistemological shifts in materializing aesthetic narratives within the postmodern fashion industry, where physicality is supplanted by digital simulations offering high perceptual fidelity, commercial viability, and artistic expressiveness.

**Key words:** digital prototyping, garment customization, sustainable design, virtual modeling, textile simulation, material optimization, design automation, creative industries, fashion digitalization.

DOI <https://doi.org/10.23856/6906>

### 1. Introduction

The development of science and innovative technologies has become a powerful driver for the adoption of 3D design and printing in the apparel industry. The widespread digitalization of manufacturing and the globalization of the economy—aimed at accelerating and intensifying the growth of the fashion industry—have complicated the implementation of personalized models. Consumers are increasingly being offered fast fashion clothing in the budget price segment to diversify their wardrobes. Research has shown that the accessibility of digital 3D graphic software, integrated with 3D printers, has facilitated the introduction of additive printing

technologies in garment production. These technologies enable the printing of removable decorative elements, the flexible combination of which allows consumers to individualize standard clothing models. Since 2011, the fashion industry has been promoting innovative products—fashion items such as clothing, external corsets, costumes, footwear, headwear, accessories, and jewelry—created using volumetric (3D) printing techniques (*Hu et al., 2023*).

Three-dimensional visualization is currently one of the most promising information technologies used across various industries. Its applications are quite extensive, as the representation of spatial objects in a 3D environment is the most familiar, intuitively understandable, and visually accessible form for human perception. There are various types of 3D visualization and virtual reality systems that provide users with the ability to perceive information about an object in a volumetric and objective manner. 3D visualization systems serve as an effective tool for designing and evaluating garment constructions in the apparel industry, through the use of an informational 3D model – a virtual prototype of the product that contains a comprehensive set of data on the properties and characteristics of the designed object.

Visualization of a product in a 3D editor enables the realistic rendering of shape, color, and material texture, thereby offering specific functional advantages in the field of apparel design and manufacturing, such as: visual formulation of the product's appearance; use of the 3D model to adjust the external shape and construction of the garment; virtual fitting on a specific body figure.

Key priorities in the development of visualization methods for the garment shaping process include: studying the geometric features of the object's form and defining the methods for its generation and display; analyzing the topographic features of the object's surface and determining methods for their representation and visualization (*Chittaro & Corvaglia, 2003*).

At present, research into the factors influencing garment shaping has selectively focused on individual properties and specific product categories, leaving many issues related to the visualization of spatial garment forms with complex surface topographies underexplored. Such garments include:

- 1) items made from fabrics like drape or bouclé, whose surfaces exhibit irregular textures and complex fabric structures that affect visual perception of form;
- 2) multi-layered garments, where surface shape is influenced by the properties of the material package and the degree of contact with areas of the human body (*Choi, 2019*).

The objective of this scholarly inquiry is to undertake a comprehensive and multi-tiered analysis of the application of three-dimensional visualization as an innovative instrument for the transformation of design practices within the fashion industry, taking into account the syncretic interplay of aesthetic, technological, and socio-cultural factors. Within the framework of this aim, the following research tasks are delineated: the identification of key paradigms conditioning the integration of 3D visualizations into fashion design processes; the elucidation of cognitive and communicative mechanisms underlying visual construction of fashion products in digital environments; and the extrapolation of innovative practices toward forecasting market dynamics in the context of digitalization. The methodological foundation rests upon an interdisciplinary synthesis of aesthetic-philosophical hermeneutics, visual semiotics, and the conceptual framework of virtual materialism, thus enabling a polyfunctional approach to the study of the phenomenon. The logic of material presentation is determined by a gradual unfolding of discourse: from the ontological premises of visibility in fashion to the applied analysis of digital case studies that allow for a critical reflection on the prospects of post-physical clothing within the realm of virtualized aesthetic communication.

## 2. Technological Foundations of 3D Clothing Visualization

In today's environment, the success of entrepreneurs largely depends on their ability to collect and process information. Across the globe, there is a rapid increase in computerization within manufacturing. The implementation of computer technologies enhances both efficiency and labor productivity. Lagging behind in high-tech development can result in significant economic setbacks. One of the key demands of the apparel market for garment enterprises is high mobility and efficiency in design processes. Rapid technological advancements, market saturation with goods, and the fast pace of changing fashion trends have led to evolving consumer expectations regarding product variety and pricing. These requirements can be addressed more quickly and with higher quality through the use of automated design systems (CAD) (*Kolosnichenko et al., 2020: 137*). A sharp leap in product quality and competitiveness is achieved through the adoption of new design technologies. Therefore, improving the design process of garment construction is of primary importance for enhancing product quality.

Among the most advanced and promising technologies in clothing design and manufacturing is 3D visualization. This approach enables the creation of digital prototypes without the need for physical samples, significantly reducing time and resource consumption. Through 3D modeling, designers can observe in real time how a garment will appear on a virtual mannequin, assess fit, proportions, fabric drape, and easily alter colors, textures, or decorative elements (*Park, 2018*). This allows for a swift response to changing fashion trends and individual customer preferences, while also fostering effective communication between all participants in the garment development process – from designer to manufacturer. The application of 3D visualization in the garment industry also contributes to the implementation of sustainable development principles, as it reduces the amount of materials used for sample creation and minimizes textile waste (*Liu, 2022*).

Research has shown that the primary direction for improving the garment design process is its automation. The process of creating garments – particularly those with decorative elements – is highly resource-intensive and laborious, often requiring multiple sample iterations and artistic board reviews based on quality indicators. This limits the potential for fully automated end-to-end design. The complexity of the design object is driven by several factors, including: the need to analyze sketch defects on a mannequin; rapid fashion changes; a wide variety of sewing materials with differing properties; a broad spectrum of creative tasks.

An automated system equipped with modern technology is capable of performing nearly all stages of the design process. However, technical equipment alone depends on the manufacturer's objectives, the specifics of the production facility, the structural complexity of the model, and the intellectual capabilities and skills of the workforce. Basic pattern construction, structural modeling according to body measurements, application of decorative elements in line with consumer and market requirements, pattern grading, fabric consumption calculations, and other aspects of garment construction can all be effectively carried out within automated design systems.

Three-dimensional (3D) clothing visualization constitutes a technologically intensive domain wherein heterogeneous engineering and mathematical constructs coalesce, encompassing topoinvariant modeling, biharmonic surface approximation, and variational mapping of the physico-mechanical attributes of textile fibers within a virtualized environment. The integration of complex three-dimensional geometric structures—particularly polygonal decomposition with multilevel level-of-detail (LOD) optimization—facilitates hyper-detailed shape formation of simulated garments, taking into account quasistatic deformations and the nonlinear responses

of textile substrates to dynamic vector fields (Choi, 2022). Within the framework of digital three-dimensionality, a synchronized interface is established between the parametric mesh of the avatar and the kinematically conditioned surface topography of the garment, modeled in real time through energetically informed methods such as branched-vector skinning or positional retargeting based on harmonic functions. Thus, 3D clothing visualization transcends mere visual representation, evolving into a high-fidelity simulational paradigm capable of emulating the nuanced behavioral characteristics of fabric under the influence of complex emergent interactions with the body and ambient environment.

### 3. Innovative Applications of 3D Visualization in the Fashion Industry

In the context of transformational shifts characterizing post-industrial society, the integration of three-dimensional visualization into the fashion sector represents a symbiosis of technological progress and aesthetic experimentation (Porterfield & Lamar, 2017). This phenomenon not only expands the boundaries of traditional perceptions of the creative process but also initiates a metamorphosis in conceptual approaches to the development, production, and presentation of textile and design products.

- three-dimensional visualization introduces fundamental changes to the methodological foundations of the fashion industry, particularly in the aspect of product development. Through comprehensive tools such as parametric fabric modeling and interactive testing of material properties, designers can achieve a high degree of analytical precision in garment design. This ensures harmony between functionality and aesthetics, minimizing anthropometric inaccuracies and production risks;

- the application of three-dimensional technologies enables a radical optimization of resources through the digitization of preliminary stages of clothing creation. This significantly reduces the volume of physical prototyping, which in traditional practice is exceedingly costly in both material and temporal dimensions. Thus, innovations promote not only cost rationalization but also a reduction of the carbon footprint within the production cycle;

- modern interactive platforms integrating 3D visualization create new modalities of interaction between manufacturers and end-users. Through digital showrooms and virtual presentations, consumers can assess multidimensional aspects of products, including their textural characteristics, fabric dynamics, and ergonomic design in a virtual environment, significantly enhancing brand trust and engagement;

- the use of 3D visualization is a decisive factor in shaping the paradigm of sustainable development within the fashion industry. Virtual model testing and their digital refinement prevent excessive material waste, substantially reducing ecological impact. This, in turn, fosters the popularization of conscious consumption concepts and circular economy principles;

- by employing 3D technologies, designers can incorporate multicultural motifs and symbolism into fashion collections without the constraints of technical or economic limitations. The virtual space serves as a laboratory for synthesizing aesthetic traditions and innovative techniques, stimulating the expansion of creative thinking horizons (Li et al., 2024; Tuan et al., 2021).

3D clothing visualization represents the future of fashion. With current advancements in this technology, there is a vast array of opportunities for creating impressive new products and materials. 3D visualization is primarily used for accessories and conceptual sculptural pieces. Despite their originality and depth, these developments are not always functional, wearable, or easy to move in (Papachristou & Anastassiou, 2022). The described tools for developing design

concepts in costume design are rooted in architectural design traditions and enable the production of relevant and original fashion models tailored for the mass market. This is expected to significantly impact online retail and the fashion industry as a whole in the near future (*Ma et al., 2021*). Thus, maintaining standards while pushing the boundaries of design activity is the result of interdisciplinary collaboration based on the convergence of fashion design, architecture, and industrial design. Collections by many costume designers are increasingly noted for their use of these technologies and for incorporating parametric design.

Within the framework of a transdisciplinary analysis of the synergistic interplay between visual technologies and contemporary modalities of material design, 3D visualization emerges not merely as a tool of projective display but as a paradigmatic construct of post-metaphysical conceptualization, wherein clothing is apprehended as a phenomenon situated at the intersection of digital ontology, aesthetic affect, and cognitive modeling (*McQuillan, 2020; Waymouth et al., 2021*). Accordingly, the table below serves as an analytic-categorical framework intended to structure the complex dynamics of techno-aesthetic implementations within the fashion industry, elucidating their capacity to transgress traditional notions of corporeality, authorship, and materiality through the lens of simulacral, interface-driven, and hermeneutic methodologies (Table 1).

Categorical Domain	Techno-aesthetic Implementation	Epistemological Implications
Virtual Morphogenesis of Garments	Integration of parametric 3D models with mutable topology into fashion design, aiming at a reflexive deconstruction of canonical textile configurations.	Initiates a decorporealized perception of form as a fluctuating category, unconstrained by material paradigms.
Hyperrealistic Texturization of Fabrics	Application of spectroscopic light-reflection models to achieve hyperrealistic simulation of textile surfaces in digital prototypes.	Provokes an ontological erasure of the boundary between material and simulated, whereby fabric becomes a metaphysical illusion.
Algorithmic Customization of Silhouettes	Utilization of adaptive visual environments responsive to anthropometric vectors, representing corporeality as a dynamic, multimodal phenomenon.	Leads to a radical reconfiguration of standardized sizing systems toward post-industrial individuation.
Transmedia Presentation of Collections	Audiovisual conversion of 3D fashion imagery into VR/AR environments to establish immersive narratives that de-technologize conventional fashion shows.	Catalyzes the emergence of a new consumer aesthetics where clothing exists more as an emotional event than a functional artifact.
Cognitive Modeling of Design Processes	Implementation of neuroevolutionary 3D systems for generative fashion construction based on empirical, semiotic, and behavioral consumer patterns.	Generates epistemological ambiguity of authorship in design, wherein the boundary between creator and simulator becomes conceptually unfixed.

In conclusion, three-dimensional visualization in the fashion sector is not only a technological breakthrough but also a means of conceptual reflection that defines new trajectories

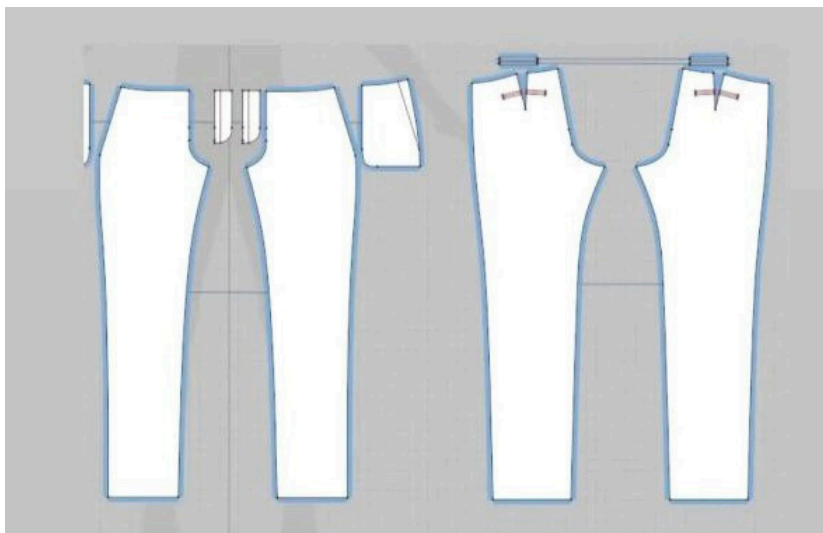


for its development. With the unique potential of this technology, the industry is empowered to transform the process of garment creation into a harmonious symbiosis of art and science, responding adeptly to the challenges of a globalized society.

#### 4. Current Challenges and Strategic Prospects for the Development of 3D Visualization Technologies

In the context of the relentless dynamics of post-industrial society and the pervasive digitalization of the creative industries, the phenomenon of 3D visualization within the fashion design sector emerges not merely as a factor of modernization, but as a paradigmatic shift in the methodology of design, prototyping, and product presentation. Of particular interest is the implementation of virtual modeling practices by the innovative fashion brand *Limerense\_com*, which utilizes advanced visualization platforms to create digital clothing analogues functioning simultaneously as conceptual artifacts and commercial entities (*Limerense\_com*, 2025).

The initial stage in the development of such a digital product involves the construction of electronic patterns using *Marvelous Designer* software, which, due to its topological precision, allows for the modeling of fabric structures with a high degree of realism and consideration of material properties. During this phase, two-dimensional design elements are structured and subsequently transformed into a virtual space, ensuring the structural fidelity of the prospective garment (*Limerense\_com*, 2025). This approach facilitates a preemptive understanding of the final silhouette, thereby minimizing production errors at the conceptualization stage (Figure 1.).



**Figure 1. Digital Pattern Drafting in Marvelous Designer:  
Initial Construction Phase**

The next phase consists of fitting the constructed patterns onto a virtual mannequin an operation that emulates the real-world fitting process while simultaneously transcending the boundaries of physical materiality. The virtual mannequin, functioning as an algorithmic model of the human body, enables the detection of potential conflicts in fabric layering and ensures the a priori adaptation of the garment's form to the morphological characteristics of the target wearer (Figure 2).



**Figure 2. Virtual Fitting on a Parametric Mannequin: Simulation of Garment Behavior**

This methodology optimizes the development of customized apparel within mass production frameworks, reducing material and temporal resources. In terms of surface detailing, ZBrush is employed as a digital sculpting environment wherein folds, tension lines, and other fabric nuances are articulated. It is within this environment that the mimetic rendering of textile behavior is achieved through the topological layering of fragments that simulate the dynamic interaction of fabric under gravity, motion, and bodily contact. The result is a hyper-realistic visual output capable of rivaling high-resolution photography or physical samples. Simultaneously, ZBrush is used to construct a prototype model of trousers, which functions as the foundational template for subsequent texture mapping. This step is crucial for the application of prints and the encoding of material properties such as glossiness, transparency, and roughness. Essentially, the model serves as a UV map framework, ensuring the precise positioning of graphical elements in accordance with the anatomical structure of the garment. This phase represents the culmination of both artistic intent and technical execution (Figure 3;4) (*Limerense\_com, 2025*).

In the final outcome, the virtual model is initially presented in its raw, textureless form, and subsequently in its fully rendered state, adorned with a designer print. This transformational continuum from digital drafting to photorealistic visualization enables the interactive engagement of potential consumers, opening new horizons in digital marketing and bespoke design. Thus, 3D visualization within the *Limerense\_com* brand stands not only as a technological instrument, but also as a medium of profound aesthetic transformation in the very conception of clothing (Figure 5) (*Limerense\_com, 2025*).

Thus, the integration of three-dimensional visualization into the processes of garment modeling, visual representation, and conceptual articulation as exemplified by the case of *Limerense\_com* reveals not only the heuristic potential of digital tools as representational mediators between ideation and realization, but also signifies an epistemological shift in the modalities of materializing aesthetic narratives within the postmodern fashion industry; for what occurs is a peculiar denaturalization of traditional production paradigms through the simulacral transformation of textile objects, whereby physical presence is supplanted by a hyperreal analogue capable of rivaling the material prototype in terms of perceptual verisimilitude, commercial efficacy, and artistic expressiveness.



Figure 3. Sculptural Detailing of Fabric Folds in ZBrush: Trousers Prototype (Stage I)



Figure 4. Advanced Drapery Modeling in ZBrush: Preparation for Texture Application (Stage II)



Figure 5. Final Visualization of the 3D Garment Model: a) Without Texture, b) With Applied Print Design

## 5. Conclusions

Thus, the effectiveness of researching the quantitative and qualitative characteristics of a garment's three-dimensional form depends not only on the complexity of the surface topography of the studied items but also on the accuracy of digital information in the virtual environment and the technical capabilities of the equipment used. It is worth noting that the use of 3D scanning technology to determine the magnitude and location of projection allowances in fur garment constructions can be recommended for designing models where the fur is positioned on the inner side of the garment specifically, shearling coats and garments with fur linings. The current level of development in additive technologies, along with the wide range of 3D printers and advanced filaments, is expanding the possibilities of 3D printing applications and enabling the creation of unique products for the garment industry. Research has demonstrated the promising potential of using additive technologies in the production of clothing items. Printed objects with complex spatial forms are in demand across various areas of apparel manufacturing from everyday and formal wear to headgear, as well as products with specialized or rehabilitative purposes. Increasing user competence and the growing proficiency of industry professionals in graphic design software not only simplify and expand the production of garments created using three-dimensional technologies and 3D printing but also contribute to shaping a new aesthetic for the society of the future.

## References

1. Chittaro, L., & Corvaglia, D. (2003). *3D virtual clothing: From garment design to Web3D visualization and simulation*. In *Proceedings of the Eighth International Conference on 3D Web Technology*. Retrieved from <https://citeseerx.ist.psu.edu/document?repid=rep1&type=pdf&doi=3cf2c95a3362e3669f96892b577f1b82fa1763af>
2. Choi, K.-H. (2019). *Digitalized dynamic fashion illustration, using motion graphics*. In *Proceedings of International Conference on Fashion Communication: Between Tradition and Future Digital Developments* (pp. 9–20). Switzerland.
3. Choi, K.-H. (2022). *3D dynamic fashion design development using digital technology and its potential in online platforms*. *Fashion and Textiles*, 9(1). Retrieved from <https://link.springer.com/content/pdf/10.1186/s40691-021-00286-1.pdf>
4. Hu, Z., et al. (2023). *Physically realizable natural-looking clothing textures evade person detectors via 3D modeling*. In *Proceedings of the IEEE/CVF Conference on Computer Vision and Pattern Recognition*. Retrieved from [https://openaccess.thecvf.com/content/CVPR2023/papers/Hu\\_Physically\\_Realizable\\_Natural-Looking\\_Clothing\\_Textures\\_Evade\\_Person\\_Detectors\\_via\\_3D\\_CVPR\\_2023\\_paper.pdf](https://openaccess.thecvf.com/content/CVPR2023/papers/Hu_Physically_Realizable_Natural-Looking_Clothing_Textures_Evade_Person_Detectors_via_3D_CVPR_2023_paper.pdf)
5. Kolosnichenko, M. V., Chuprina, N. V., Krotova, T. F., & Olishevskaya, T. M. (2020). *Designing fashion clothing based on the principles of parametric design*. *Art and Design*, 1(09), 129–141.
6. Li, Z., et al. (2024). *An analysis of the status and trend of visualization research in 3D fashion design*. *Journal of the Balkan Tribological Association*, 30(2). Retrieved from [https://openurl.ebsco.com/EPDB:gcd:16:31020128/detailv2?sid=ebsco:plink:scholar&id=ebsco:gc-d:178373718&crl=c&link\\_origin=scholar.google.com.ua](https://openurl.ebsco.com/EPDB:gcd:16:31020128/detailv2?sid=ebsco:plink:scholar&id=ebsco:gc-d:178373718&crl=c&link_origin=scholar.google.com.ua)
7. Limerense\_com. (2025). *Instagram page*. Retrieved from [https://www.instagram.com/limerense\\_com?igsh=eWhqa2ZjZmtvMXJz](https://www.instagram.com/limerense_com?igsh=eWhqa2ZjZmtvMXJz)
8. Liu, H. (2022). *Computer 5G virtual reality environment 3D clothing design*. *Mobile Information Systems*, 2022(1), 8024453. Retrieved from <https://onlinelibrary.wiley.com/doi/pdf/10.1155/2022/8024453>

9. Ma, Q., et al. (2021). The power of points for modeling humans in clothing. In *Proceedings of the IEEE/CVF International Conference on Computer Vision*. Retrieved from [https://openaccess.thecvf.com/content/ICCV2021/papers/Ma\\_The\\_Power\\_of\\_Points\\_for\\_Modeling\\_Humans\\_in\\_Clothing\\_ICCV\\_2021\\_paper.pdf](https://openaccess.thecvf.com/content/ICCV2021/papers/Ma_The_Power_of_Points_for_Modeling_Humans_in_Clothing_ICCV_2021_paper.pdf)
10. McQuillan, H. (2020). Digital 3D design as a tool for augmenting zero-waste fashion design practice. *International Journal of Fashion Design, Technology and Education*, 13(1), 89–100.
11. Papachristou, E., & Anastassiou, H. T. (2022). Application of 3D virtual prototyping technology to the integration of wearable antennas into fashion garments. *Technologies*, 10(3). Retrieved from <https://www.mdpi.com/2227-7080/10/3/62>
12. Park, J. (2018). Emotional reactions to the 3D virtual body and future willingness: The effects of self-esteem and social physique anxiety. *Virtual Reality*, 22, 1–11.
13. Porterfield, A., & Lamar, T. A. (2017). Examining the effectiveness of virtual fitting with 3D garment simulation. *International Journal of Fashion Design, Technology and Education*, 10(3), 320–330.
14. Tuan, T. T., et al. (2021). Multiple pose virtual try-on based on 3D clothing reconstruction. *IEEE Access*, 9, 114367–114380.
15. Waymouth, B., et al. (2021). Demonstrating cloth folding to robots: Design and evaluation of a 2D and a 3D user interface. In *2021 30th IEEE International Conference on Robot & Human Interactive Communication (RO-MAN)*. IEEE. Retrieved from <https://arxiv.org/pdf/2104.02968>

## THE GENRE SPECIFICITY OF INTERACTIVE CINEMA

**Olexander Poberailo**

Postgraduate Student at the Department of Art Studies,

Kharkiv State Academy of Culture, Ukraine

e-mail: [poberailo@gmail.com](mailto:poberailo@gmail.com), [orcid.org/0009-0003-8259-4921](https://orcid.org/0009-0003-8259-4921)

### Summary

This article aims to investigate the genre specificity of interactive cinema by analyzing the transformation of traditional cinematic genre conventions under the influence of key characteristics of interactivity, such as user agency and narrative non-linearity. The relevance of the study stems from the growing popularity of interactive media and the necessity for theoretical conceptualization of their hybrid nature, which complicates genre classification. The research methodology comprises a theoretical analysis of genre concepts in film studies and interactive media theory, a comparative analysis of interactive cinema, traditional cinema, and video games, as well as case studies of representative interactive works: *Black Mirror: Bandersnatch*, *Late Shift*, and *Detroit: Become Human*. The research findings establish that interactive cinema functions not as a distinct genre, but as a spectrum of hybrid forms. It was found that interactivity fundamentally reshapes plot structures, character evolution, and stylistic elements. It is demonstrated that the nature of this transformation depends on the interplay between the technological platform, which determines the available toolkit of interactivity, and the conventions of the source genre, which influence how these tools are applied. The scientific novelty lies in the systematic analysis of the specific mechanisms of genre convention transformation, which enables a deeper understanding of the specifics of genre formation in interactive cinema. The work substantiates the prospects for further research in this dynamic field.

**Key words:** interactive film, interactive storytelling, genre theory, user agency, nonlinear narrative, hybrid media, gaming.

DOI <https://doi.org/10.23856/6907>

### 1. Introduction

The contemporary media-cultural landscape is increasingly characterized by the proliferation of hybrid forms emerging from the convergence of traditional artistic practices and novel digital technologies. A significant manifestation of this synthesis is interactive cinema – a phenomenon that integrates cinematic aesthetics with interactive mechanics, largely borrowed from video games. Although the origins of interactive cinema date back to early experiments with interactivity in media, recent years have witnessed a renewed scholarly and practical interest in this phenomenon, driven by the development of streaming platforms, the advancement of game engines, and virtual reality technologies. Despite its growing popularity, this phenomenon remains insufficiently conceptualized, particularly regarding its genre identification. The hybrid nature of interactive cinema complicates its unambiguous categorization within existing taxonomic systems of cinematic or game genres. Thus, the key research question concerns how fundamental characteristics of interactivity – primarily user agency and narrative non-linearity – transform established conventions of the cinematic genre.



**Analysis of current research.** Analysis of the scholarly literature indicates that significant attention is devoted to the conceptualization and definition of the concept of 'interactive cinema' itself and related terms such as 'interactive narrative' and 'interactive storytelling'. Researchers acknowledge the inherent hybridity of these forms, which combine elements of cinema and video games. Historically, the term 'interactive cinema' was often associated with technologically specific formats, such as Full-Motion Video (FMV) games of the 1990s (*Kalender & Ucan, 2022; Perron, 2003*), leading to discussions regarding its essence and potential oxymoronic nature (*Veale, 2012*). The contemporary understanding is broader, encompassing a spectrum of works where the viewer/user influences narrative development in some way. In this context, the work of H. Koenitz is significant; he emphasizes the need for a unified theory of Interactive Digital Narrative (IDN) which would encompass narrative analysis, interoperability, sustainability, and user-centered design (*Koenitz, 2015*).

Active investigation into the nature of interactivity and user agency results in typologies of interactivity, analysis of its role in shaping the user experience, and refinement of the concept of agency (*Cruz, 2019*). It is precisely the type of agency that raises a key question in interactive works: the balance between authorial control and user freedom (*Hassapopoulou, 2021*).

The study of narrative structures and technological aspects of interactive works involves analyzing the transition from linear to branching narratives and non-linear plots (*Aarseth, 1997; Ryan, 2001, 2015*). Particular attention is paid to technological solutions, such as 'drama managers' (software for controlling plot logic and narrative flow) (*Szilas, 2003*) and the use of engines for tracking variable states (*Salen & Zimmerman, 2003*).

Furthermore, attention to ethical dimensions and the specifics of reception should be noted. M. Hassapopoulou, in particular, analyzes 'the ambiguous ethics of media participation', criticizing binary oppositions (liberation vs. manipulation) (*Hassapopoulou, 2021*). Research explores how interactive works can be used to immerse users in morally complex scenarios, either stimulating reflection or, conversely, potentially trivializing ethical choices (*Night Watch: An Analysis of Late Shift, 2018*). However, despite the breadth of the research field, the analysis of the transformation of specifically cinematic genre conventions under the influence of interactivity remains fragmentary. There is a lack of systematic research into the mechanisms of restructuring plot structures, character functions, and stylistic devices across a broad spectrum of traditional cinematic genres during their adaptation to the interactive format.

## 2. Main part

In film studies, the concept of genre is defined as a classification system for films based on a set of shared narrative, stylistic, and thematic conventions that are shared and recognized by both creators of audiovisual content and its audience (*Neale, 2000; Schatz, 1981*). This system performs an important function, serving as a specific communicative framework within the cinematic process. On the one hand, it provides filmmakers with proven models of narrative and expression; on the other hand, it shapes certain expectations for viewers regarding content, style, and potential emotional experience (*Miracalize, 2024*).

However, it should be emphasized that genre categories represent dynamic systems in a state of constant evolution, transformation, and interaction, resulting in the emergence of hybrid genre forms (*Genre Conventions - Film and Media Theory, n.d.*). Key to understanding the viability and development of genres is the dialectical relationship between the repetition of established elements and their variability or difference (*Neale, 2000*). The repetition of familiar conventions—typical plot points, visual motifs, character archetypes—ensures genre recognition

by the audience and activates corresponding schemas of perception and interpretation (*Steve Neale – Genre Theory, 2017*). At the same time, it is precisely difference, innovative reinterpretation, and variation within these conventions that maintain audience interest, preventing genre stagnation and its transformation into a rigid template. This dialectic allows genres to adapt to changes in the sociocultural context, technological innovations, and the evolution of audience preferences.

To analyze the genre specificity of a cinematic work, researchers typically address a complex of interconnected conventional elements. In particular, Rick Altman proposed distinguishing between semantic and syntactic components of genre (*Altman, 1999*). The semantic dimension, according to Altman, encompasses the basic 'building blocks' of the genre: characteristic traits of characters, typical locations of action, recognizable images, and elements of iconography (*Altman, 1999, pp. 21-22*). The syntactic dimension, conversely, pertains to the ways these semantic elements are organized, revealing semantic structures, thematic dominants, and narrative patterns formed in their interaction (*Altman, 1999, pp. 21-22*). Alongside these narrative-thematic elements, the dominant visual style, characteristic features of sound design and musical accompaniment, and the overall tone and mood of the work are analyzed (*How to Master Movie Genres: The Ultimate Guide For 2025, 2025; Film Genre Conventions to Know for Film Aesthetics, n.d.*).

Defining the concept of 'interactive cinema' constitutes a complex task, due to its inherent hybridity and the significant diversity of forms existing at the intersection of cinema, video games, and new media. The term itself is sometimes perceived as debatable [or 'contentious'] as it combines the traditionally passive receptive model of film viewing with the active participatory engagement characteristic of gaming practices (*Veale, 2012*). Due to this diversity, 'interactive cinema' is often considered in scholarly literature as an umbrella term uniting various forms, technologies, and purposes for the application of interactivity.

Despite this, it is possible to distinguish a series of key characteristics inherent in most forms of interactive cinema. The central feature is, undoubtedly, interactivity – an immanent property of the media text that enables user interaction with it (*Cruz, 2019*). A second important characteristic emerges as non-linearity or narrative branching. This non-linearity can be implemented with varying degrees of complexity – from binary choices to complex systems with numerous variables and conditions. A third key characteristic is user agency. This concept denotes the degree of control and significance of influence that the user exerts over the narrative world and the development of depicted events (*Murray, 1997*). The sense of agency serves as an important factor in user engagement and immersion. However, it should be noted that interactivity can both enhance immersion, increasing the level of engagement and the sense of personal influence on events, and disrupt it, if the interaction mechanisms are clumsy [or 'awkward'], interrupt the narrative flow, or too explicitly indicate the artificiality of the constructed experience (*Ryan, 2001, 2015*).

Traditional cinema, as previously noted, is characterized primarily by a passive receptive model of audience perception. The viewer acts as an observer of unfolding events, lacking the ability to influence their course. The narrative is typically linear; even when non-linear narrative techniques such as flashbacks are employed, the overall sequence remains fixed by the author, and the story's ending is predetermined by the director and screenwriter, who exercise complete control over the narrative process, visual execution, and potential emotional impact on the viewer. The primary mode of interaction here is viewing.

In contrast to cinema, video games require active player participation. They are defined as systems in which players are engaged in an artificial conflict, governed by rules, that leads

to a measurable outcome (Salen & Zimmerman, 2003). The player exerts deliberate effort to influence this outcome by interacting with the game's rules and its virtual world (Juul, 2005). The structure of video games is often non-linear, and the outcome depends on the player's skills, strategic decisions, and actions. The central elements here are player agency and gameplay mechanics. Although many contemporary video games possess a distinct narrative component, the interplay between ludic (gameplay) and narrative elements can be complex. Meanwhile, the primary mode of interaction is play, which can shape specific participant identities such as 'gamer' and 'player' (Perron, 2003).

Occasionally, the phenomenon of so-called ludonarrative dissonance may be observed, wherein the actions performed by the player within the gameplay contradict the themes or character traits presented in the narrative (Hocking, 2007). The consequence of this can be a disruption of immersion and the integrity of the work's perception, when, for example, a character portrayed as a pacifist is compelled to resort to excessive violence to progress through game levels, or a serious dramatic narrative is interrupted by arcade-style gameplay sections. Although this phenomenon is more characteristic of video games with complex mechanics, a similar tension can arise in interactive cinema if the choices offered to the player or the required actions align poorly with the character's developmental logic or the stated genre conventions, creating a sense of artificiality or inconsistency.

Interactive cinema, in turn, attempts to synthesize features of both discussed phenomena. Although some researchers consider interactive films a specific game genre (Perron, 2007), one can note the active use of cinematic aesthetics and expressive means in such projects compared to video games. At the same time, the transformation of the narrative component by key elements of interactivity leads to the creation of a branching structure with multiple potential paths and endings.

Such a branching structure, sometimes visualized using flowcharts, as in the game *Detroit: Become Human* (2018), poses significant challenges for narrative design. The primary task becomes ensuring narrative coherence and the logical sequence of events within each individual branch and between them (Ryan, 2001, 2015). Questions arise regarding ensuring the meaningfulness and emotional satisfaction of each possible protagonist path, as well as aligning multiple plotlines with a unified thematic or ideological focus of the work. These issues require meticulous script planning and, in some cases, the use of specialized technological solutions, such as drama management systems ('drama managers') (Szilas, 2003) or designing the narrative based on the principle of main and side plotlines (A-Plot/B-Plot).

Non-linearity also significantly impacts the traditional mechanisms for controlling pacing and suspense in narrative. Whereas in linear cinema the director exercises complete control over the narrative rhythm and the timing of key information reveals, in an interactive work, the pace can vary depending on the user's decision-making speed. The option to replay an episode or choose an alternative path potentially reduces the tension associated with the sense of inevitability. At the same time, the act of choosing itself, especially under time constraints or with uncertain consequences, can become a new, specific source of suspense for the participant.

A deeper level of transformation concerns narrative causality and methods of theme development. A traditional narrative is typically built upon a clear cause-and-effect chain. Interactivity, in contrast, introduces a multiplicity of such chains: Choice X might lead to Event Y, whereas Choice Z leads to Event W. This requires authors either to ensure thematic coherence and resonance between different narrative branches, or to transform the very process of choice and its consequences into the central theme of the work, as implemented, for example, in *Black Mirror: Bandersnatch* (2018) in its exploration of free will and responsibility. The thematic

core of the work no longer unfolds along a single line but must either resonate across multiple potential paths or be constituted by the very structure of interactive engagement.

Some researchers also point to the inherent tension between narrative logic and database logic in interactive works (Manovich, 2001). Interactive products can be viewed as structured collections (databases) of discrete content elements (scenes, dialogues, choice options) from which the user forms their own unique sequence. Lev Manovich contrasts database logic, where each element is potentially equivalent, with traditional narrative logic, which entails sequential development and rigid cause-and-effect relationships. In many interactive works, this tension is evident: the aspiration to provide the user with access to a broad database of possibilities can conflict with the necessity of maintaining a coherent, sequential, and compelling narrative.

Interactivity profoundly changes not only the plot structure but also the very nature and functioning of characters within the narrative. Whereas in traditional cinema, characters typically follow a predetermined authorial trajectory with fixed developmental arcs, in interactive cinema, their actions, decisions, interpersonal relationships, and, ultimately, narrative fate are directly shaped or significantly influenced by the choices of the viewer/participant. This transforms the character from a passive object of observation into a dynamic node of interaction, whose path can vary significantly across different playthrough iterations, as clearly demonstrated by the example of the three protagonists in *Detroit: Become Human* (2018).

The central concept explaining this transformation is, once again, agency. As defined by Janet Murray, agency is "the satisfying power to take meaningful action and see the results of our decisions and choices" (Murray, 1997). In the context of interactive cinema, agency means that the participant gains the ability to act – often through an avatar or on behalf of a character – and to observe the consequences of these actions within the narrative world. However, as noted earlier, agency in interactive works is often limited or illusory. Authors retain significant control over the overall narrative structure by offering choices that may lead to predetermined outcomes or by creating situations where the player's actual influence is minimal (Rose & Zytka, 2020). This tension between the promised freedom of choice and the actual systemic limitations can lead to a specific, ambivalent perception of the character: whether they are perceived as a fully-fledged protagonist with their own volition, or rather as a puppet in the hands of the player and/or developer. Understanding these limitations is crucial for analyzing the interactive experience and its impact on character perception.

The introduction of interactivity necessitates the reconsideration and adaptation of traditional cinematic stylistic devices. The traditional visual language of cinema, encompassing shot composition, camera movement, angles, and editing strategies, historically evolved to serve primarily linear narratives with a fixed or authorially controlled point of view. The interactive environment calls into question the direct and unaltered application of these established conventions (Murray, 1997). Consequently, maintaining visual integrity and stylistic unity amidst narrative branching becomes a significant challenge for direction and editing. This is particularly true for ensuring smooth, 'seamless' transitions between different video fragments in FMV-format works, where the pursuit of such continuity, unlike in earlier examples, often becomes a priority (*Night Watch: An Analysis of Late Shift*, 2018). This aspiration towards intuitive visual navigation and the inconspicuousness of transitions can, in turn, limit the use of more expressive or complex authorial visual and editing techniques inherent in traditional cinema.

Sound design in the interactive environment also acquires expanded functions compared to its role in traditional cinema. Sound not only creates atmosphere, conveys emotions, and underscores action, but also often performs important interactive tasks: it can serve as direct

acoustic feedback to user actions, signal available choice options, enhance immersion through the dynamic reaction of the sound environment to the player's presence or actions, and also be used for navigation and attention management in non-linear spaces or virtual environments (Collins, 2013; Collins, 2008). This interaction, where user actions directly generate or modify sound events, contributes to deeper immersion and enhanced identification. At the same time, the variability of pace and event sequence poses challenges for traditional methods of music composition and sound accompaniment organization, requiring more flexible, adaptive, and often procedural audio solutions.

Perhaps the most prominent stylistic innovation of interactive cinema is the user interface (UI). Interface elements (graphical choice menus, countdown timers, text prompts, interactive icons) become not merely a technical means of interaction, but an integral part of the work's visual and, to some extent, stylistic system. Lev Manovich introduces the concept of the 'cultural interface', describing how the conventions of the computer graphical interface (windows, menus, buttons) are integrated with the conventions of previous media (cinema, print) to organize access to and interaction with cultural information (Manovich, 2001). UI design in interactive cinema must address several objectives: it must clearly and unambiguously present choice options, be intuitively understandable to the user, and, at the same time, minimally interfere with the narrative flow and immersive experience so as not to disrupt the effect of immersion (*The importance of storytelling in UI/UX design*, 2023; Yurtseven, 2023).

An important aspect of interactivity's influence on the genre specificity of audiovisual works is the creation of an internal tension between the aspiration for narrative immersion and the necessity of conscious participation and interaction by the user, which aligns more closely with the logic of video games. Traditional cinema, as a rule, aims to achieve a state of immersion where the viewer becomes maximally absorbed in the fictional world, temporarily abstracting from reality and the medium itself as an intermediary (Ryan, 2001). In contrast, many video games, especially those requiring skill development and strategic thinking, often induce a state of 'flow' (Csikszentmihalyi, 1990).

Interactive cinema finds itself in a complex position between these two poles of medial experience. It employs cinematic means to create a convincing and immersive narrative world but simultaneously requires the viewer/participant to periodically interrupt the state of passive contemplation to make active choices via the interface. The very act of choosing, the necessity of analyzing the proposed options, and physically interacting with control elements inevitably remind the user of the artificial, constructed nature of the experience and their own role as an active participant. This can lead to a disruption of narrative immersion, destroying the sense of continuity and the 'invisibility' of the medium. Therefore, a key task for developers of interactive cinema becomes the meticulous design of interaction aimed at minimizing this potential dissonance. This inherent tension between immersion and interactivity, it seems, also influences the process of genre transformation, as different genres may react and adapt differently to such an 'intermittent', participatory mode of audience engagement.

A detailed analysis of specific interactive audiovisual works allows for tracing the mechanisms of genre convention transformation in practice and illustrating the theoretical propositions outlined above. For this purpose, three representative case studies were selected – the television series episode *Black Mirror: Bandersnatch* (2018), the FMV film *Late Shift* (2017), and the video game *Detroit: Become Human* (2018) – considering their representativeness as prominent contemporary examples of interactive narratives, as well as the diversity of their presented platforms and technologies (ranging from streaming to AAA games), the variability of interactive mechanics (from binary choices to complex gameplay), and the difference in source



genre models (psychological thriller/sci-fi, crime thriller, sci-fi/drama), which enables the study of the adaptation of different conventions. Thus, the selected case studies illustrate the diversity of approaches to integrating interactivity into narrative forms and provide a basis for a nuanced comparative analysis of this integration's impact on genre characteristics.

A comparison of the interactive mechanics employed in these works reveals significant differences, stemming from both the specifics of the technological platforms and the established creative objectives. *Bandersnatch* offers the user a relatively simple system of explicit binary choices at defined moments in the plot; however, it supplements this with complex meta-narrative elements, notably plot loops, recursive structures, and the direct thematization of external control over the character. *Late Shift*, striving for the maximum preservation of the cinematic experience within the crime thriller genre, utilizes a mechanic of rapid real-time choices with a limited timer, compelling the participant to react instantaneously, thereby maintaining genre tension, and aims to ensure 'seamless' transitions between scenes. In contrast, *Detroit: Become Human*, as a representative of the contemporary game industry, demonstrates the broadest spectrum of interactive possibilities: the player controls the actions of three different protagonists, makes choices in dialogue systems, directly interacts with objects in the game environment, participates in Quick Time Events (QTE) scenes, utilizes unique character abilities for situation analysis, and gains access to a visualization of the complex network of plot branches. These differences in the implementation of interactivity directly influence the ways in which key genre elements are transformed.

An examination of the plot structures in the three case studies reveals variability in the approaches to implementing non-linearity. In *Bandersnatch*, branching and recursion become not merely tools of variability, but the central element constituting the work's meaning within the genres of psychological thriller and science fiction; the structure itself transforms into a thematic statement on free will and determinism, undermining the convention of protagonist reliability and their perception of reality, characteristic of the psychological thriller genre. *Late Shift* retains a recognizable plot structure of a crime thriller (robbery, pursuit, protagonist's moral dilemmas); however, the multiplicity of choices generates seven different final outcomes for the story. The real-time choice mechanic is used here as a means of maintaining genre suspense, simulating the necessity for quick decisions in critical situations, although the pursuit of 'seamless' transitions may at times negate classic editing techniques for building tension. *Detroit: Become Human* presents an exceedingly complex system of intertwined plotlines for three characters in a science-fiction setting. Here, interactivity allows for the exploration of classic sci-fi conventions (artificial intelligence, dystopia, social commentary) through the variability of character paths (e.g., the choice between peaceful protest and violent android uprising), where player decisions have long-term consequences and can lead to radically different resolutions, both for individual characters and for the overall state of the depicted world.

In terms of character evolution and the implementation of user agency, the analyzed works also demonstrate different models. *Bandersnatch* explicitly thematizes the problem of agency, calling into question the player's actual control over events and transforming the protagonist, Stefan, into an object of external manipulation. This undermines the conventional identification with the hero and their subjectivity, typical of psychological thrillers, making the player complicit in his suffering (Yurtseven, 2023; Rose & Zytko, 2020). *Late Shift* provides the player with the opportunity to determine the actions of the main character, Matt; however, the nature of the choices is often assessed as primarily pragmatic, dictated by the circumstances of a typical crime thriller (escape, survival), rather than as choices that deeply reveal the inner world or allow for significant alteration of the character archetype (*Night Watch: An Analysis of*



*Late Shift*, 2018). In contrast, *Detroit: Become Human* grants the player significant agency in shaping the moral character and subsequent fate of all three protagonists. This allows for active exploration of themes such as consciousness, freedom, and responsibility through the decisions made and their consequences, modifying classic dramatic character arcs (the hero's journey, moral decline, redemption) depending on player actions.

The stylistic decisions employed in the analyzed works also reflect their hybrid nature and medial origins. *Bandersnatch* retains the visual stylistics and atmosphere of its parent television series, *Black Mirror*, using somber color palettes, unsettling music, and specific camera angles to enhance the thematic (technophobia, mental disorders) and meta-narrative aspects characteristic of the anthology. *Late Shift* maximally emulates the aesthetics of a realistic cinematic thriller (use of handheld camera, dynamic editing in action scenes), relying on FMV technology and striving for the visual inconspicuousness of interactive 'seams' so as not to disrupt conventional cinematic perception. *Detroit: Become Human*, in turn, utilizes advanced computer graphics and motion capture technologies to create the high-quality cinematic visuals characteristic of high-budget video games. However, it simultaneously integrates distinct graphical user interface elements (object highlighting, choice diagrams, QTE markers), which, although serving interaction purposes, also visually emphasize the interactive, 'game-like' nature of the experience, distinguishing it from traditional cinematic stylistics.

Based on the comparative analysis presented above, the key characteristics of the discussed case studies are summarized in Table 1.

Table 1.

**Comparative Analysis of Interactive Work Case Studies**

Aspect of Analysis	<i>Black Mirror: Bandersnatch</i> (2018)	<i>Late Shift</i> (2017)	<i>Detroit: Become Human</i> (2018)
Platform / Origin	Streaming (Netflix) / TV Series Episode	Independent Film / FMV Technology	AAA Video Game / Game Engine
Source Genre (Primary)	Psychological Thriller / Science Fiction	Crime Thriller	Science Fiction Drama
Interactive Mechanics	Binary choices, Recursion, Metanarrative	Timed choices, 'Seamless' transitions	Dialogues, Exploration, QTEs, Control of 3 protagonists, Choice diagram
Plot Structure	Branching, Recursive, Convergent	Branching (7 endings), Linear core	Complex branching, Intertwined lines, Variable consequences
Agency Implementation	Thematized, Limited, Illusory	Pragmatic, Genre-constrained	Significant, Impacts character morality/fate, Variable relationships
Stylistic Approach	<i>Black Mirror</i> series aesthetics, Metanarrative	Realistic crime thriller, 'Seamlessness'	Cinematic graphics (AAA), Distinct game UI
Transformation of Genre Conv.	Thematization of control (thriller), Deconstruction of free will (sci-fi), Undermining of identification	Suspense enhancement via timed-choice, Preservation of thriller plot	In-depth exploration of sci-fi themes via choice, Dramatic arcs dependent on player

Thus, it can be stated that the influence of interactivity on genre conventions is neither universal nor homogeneous. The nature and depth of the transformation depend significantly on the specifics of the implemented interaction mechanics, the capabilities and limitations of the technological platform, as well as on the conventions of the source genre towards which the work gravitates.

### 3. Conclusions

Therefore, the conducted research allows us to assert that interactive cinema functions as a complex hybrid media form, rather than as a single, clearly defined genre according to traditional film studies criteria. Its key characteristics include the introduction of interactivity, the development of non-linear or branching narrative structures, and the provision of a certain degree of user agency. These features create a specific inherent tension between the aspiration for narrative immersion, characteristic of cinema, and the necessity of conscious interaction with the interface and game mechanics.

The research confirmed that an understanding of traditional cinematic genre conventions serves as a necessary basis for analyzing their transformation in the interactive environment. The main mechanisms through which interactivity impacts key components of genre structure were identified. Firstly, plot structures undergo fundamental restructuring, becoming branched, which necessitates new strategies for ensuring narrative coherence. Secondly, characters are transformed into dynamic entities whose development and fate are co-created by the user, which brings the issues of agency, identification, and the moral dimension to the forefront. Thirdly, traditional stylistic elements, such as cinematography and editing, are adapted; sound design acquires interactive functions, and the key innovation becomes the user interface, which is integrated into the visual and functional system of the work.

Analysis of the specific examples (*Black Mirror: Bandersnatch*, *Late Shift*, *Detroit: Become Human*) demonstrated that the nature and depth of this transformation depend on the complex interplay between the technological capabilities of the specific platform, which determines the available toolkit of interactivity, and the conventions of the source cinematic genre (thriller, science fiction, etc.), which influence the manner in which these tools are applied to achieve a specific narrative and aesthetic effect. Thus, it can be argued that the genre specificity of interactive cinema lies not so much in the formation of a new independent genre as in the very process of profound transformation of existing cinematic genre conventions under the influence of interactive mechanics and technological platforms. Interactivity acts not merely as a formal added element, but as a fundamental factor that restructures narrative logic, the system of relationships between 'author – character – audience/participant', and the very audiovisual language of the work.

The scientific novelty of the work lies in the comprehensive analysis of the specific mechanisms of this transformation at the level of plot, character, and style in interactive cinema. In contrast to a simple assertion of the phenomenon's hybridity, the research details precisely how interactivity reshapes established genre structures, enabling a more systematic understanding of the specifics of genre formation processes in this dynamic media environment.

The conducted research opens prospects for further scholarly inquiries in several directions. In-depth study of the influence of emerging technologies appears warranted, particularly virtual (VR) and augmented (AR) reality, as well as generative artificial intelligence (AI), on the further evolution of interactive narratives and their genre characteristics. Analysis of the specific transformation of other cinematic genres when adapted to the interactive format also merits particular attention.

## References

1. Aarseth, E. J. (1997). *Cybertext: Perspectives on Ergodic Literature*. Johns Hopkins University Press. <https://doi.org/10.1177/13548565980040031>
2. Altman, R. (1999). *Film/Genre*. British Film Institute.
3. *Black Mirror: Bandersnatch* (2018). House of Tomorrow, Netflix.
4. Collins, K. (2008). *Game Sound: An Introduction to the History, Theory, and Practice of Video Game Music and Sound Design*. MIT Press. <https://doi.org/10.7551/mitpress/7909.001.0001>
5. Collins, K. (2013). *Playing with Sound: A Theory of Interacting with Sound and Music in Video Games*. MIT Press. <https://doi.org/10.7551/mitpress/9442.001.0001>
6. Genre Conventions – Film and Media Theory (n.d.). Fiveable Library. [Online] <https://library.fiveable.me/key-terms/film-and-media-theory/genre-conventions>
7. Csikszentmihalyi, M. (1990). *Flow: The Psychology of Optimal Experience*. Harper & Row. [https://www.researchgate.net/publication/224927532\\_Flow\\_The\\_Psychology\\_of\\_Optimal\\_Experience](https://www.researchgate.net/publication/224927532_Flow_The_Psychology_of_Optimal_Experience)
8. Cruz, D. M. (2019). *Interactive Cinema: Modes of Spectatorship and Active Participation*. Presented at The Asian Conference on Media, Communication & Film (MediAsia2019). [https://papers.iafor.org/wp-content/uploads/papers/mediasia2019/MediAsia2019\\_53244.pdf](https://papers.iafor.org/wp-content/uploads/papers/mediasia2019/MediAsia2019_53244.pdf)
9. *Detroit: Become Human* (2018). Quantic Dream. Sony Interactive Entertainment.
10. Hassapopoulou, M. (2021). *Interactive cinema: The ambiguous ethics of media participation*. Routledge. [https://filmquarterly.org/wp-content/uploads/2024/05/Hassapopoulou\\_Inte-active\\_Introduction-1.pdf](https://filmquarterly.org/wp-content/uploads/2024/05/Hassapopoulou_Inte-active_Introduction-1.pdf)
11. Hocking, C. (2007). *Ludonarrative Dissonance in Bioshock: The Problem of What the Game is About*. Click Nothing [Online]. [http://clicknothing.typepad.com/click\\_nothing/2007/10/ludonarrative-d.html](http://clicknothing.typepad.com/click_nothing/2007/10/ludonarrative-d.html)
12. *How to Master Movie Genres: The Ultimate Guide For 2025*. (2025). FilmLocal. [Online] <https://filmlocal.com/filmmaking/how-to-master-movie-genres/>
13. Juul, J. (2005). *Half-Real: Video Games between Real Rules and Fictional Worlds*. MIT Press.
14. Kalender, M., & Ucan, O. (2022). *Interaction Elements in Full Motion Video Games*. AURUM Journal of Engineering Systems and Architecture, 6(2), (pp.191-205). <https://doi.org/10.53600/ajesa.1119808>
15. Koenitz, H. (2015). *Towards a specific theory of interactive digital narrative*. In *Interactive Digital Narrative: History, Theory, and Practice* (pp. 91–105). Routledge. <https://doi.org/10.4324/9781315769189>
16. *Late Shift* (2017) CtrlMovie, Wales Interactive.
17. Manovich, L. (2001). *The Language of New Media*. MIT Press. <https://manovich.net/content/04-projects/163-language-of-new-media/language.pdf>
18. Miracalize.com. (2024). *What is a Genre Convention in Film? Definition explained*. Miracalize. [Online] <https://miracalize.com/genre-conventions-film-explained/>
19. Murray, J. H. (1997). *Hamlet on the Holodeck: The Future of Narrative in Cyberspace*. MIT Press.
20. *Film Genre Conventions to Know for Film Aesthetics*. (n.d.)Fiveable Library. [Online] <https://library.fiveable.me/lists/film-genre-conventions>
21. Neale, S. (2000). *Genre and Hollywood*. Routledge. [https://api.pageplace.de/preview/DT0400.9781134973460\\_A23794380/preview-9781134973460\\_A23794380.pdf](https://api.pageplace.de/preview/DT0400.9781134973460_A23794380/preview-9781134973460_A23794380.pdf)

22. *Night Watch: An Analysis of Late Shift*. (2018). *Giant Bomb*. [Online] [https://www.giantbomb.com/profile/gamer\\_152/blog/night-watch-an-analysis-of-late-shift/116506/](https://www.giantbomb.com/profile/gamer_152/blog/night-watch-an-analysis-of-late-shift/116506/)
23. Perron, B. (2003). *From Gamers to Players and Gameplayers: the Example of Interactive Movies*. *The video game theory reader*. New York and London, Routledge. (pp. 237-258). [https://www.academia.edu/2989128/From\\_Gamers\\_to\\_Players\\_and\\_Gameplayers\\_the\\_Example\\_of\\_Interactive\\_Movies](https://www.academia.edu/2989128/From_Gamers_to_Players_and_Gameplayers_the_Example_of_Interactive_Movies)
24. Perron, B. (2007). *Genre Profile: Interactive Movies*. *Video Game History: From Bouncing Blocks to a Global Industry*. Greenwood Press. [https://www.academia.edu/2989127/Genre\\_Profile\\_Interactive\\_Movies](https://www.academia.edu/2989127/Genre_Profile_Interactive_Movies)
25. *From Bouncing Blocks to a Global Industry*. Greenwood Press. [https://www.academia.edu/2989127/Genre\\_Profile\\_Interactive\\_Movies](https://www.academia.edu/2989127/Genre_Profile_Interactive_Movies)
26. Rose, M., & Zytka, D. (2020). *The Case for Invisibility: Understanding and Improving Agency in Black Mirror's Bandersnatch and Other Interactive Digital Narrative Works*. [https://www.researchgate.net/publication/345308694\\_The\\_Case\\_for\\_Invisibility\\_Understanding\\_and\\_Improving\\_Agency\\_in\\_Black\\_Mirror's\\_Bandersnatch\\_and\\_Other\\_Interactive\\_Digital\\_Narrative\\_Works](https://www.researchgate.net/publication/345308694_The_Case_for_Invisibility_Understanding_and_Improving_Agency_in_Black_Mirror's_Bandersnatch_and_Other_Interactive_Digital_Narrative_Works)
27. Ryan, M.-L. (2001). *Narrative as Virtual Reality: Immersion and Interactivity in Literature and Electronic Media*. Johns Hopkins University Press. DOI:10.2307/3201597
28. Ryan, M.-L. (2015). *Narrative as Virtual Reality 2: Revisiting Immersion and Interactivity in Literature and Electronic Media*. Johns Hopkins University Press. <https://muse.jhu.edu/book/72246/>
29. Salen, K., & Zimmerman, E. (2003). *Rules of Play: Game Design Fundamentals*. MIT Press. <https://gamifique.wordpress.com/wp-content/uploads/2011/11/1-rules-of-play-game-design-fundamentals.pdf>
30. Schatz, T. (1981). *Hollywood Genres: Formulas, Filmmaking, and the Studio System*. Temple University Press. [https://www.doctormacro.com/Movie%20Books/PDF%20Files/Hollywood%20Genres%20\(Thomas%20Schatz\).pdf](https://www.doctormacro.com/Movie%20Books/PDF%20Files/Hollywood%20Genres%20(Thomas%20Schatz).pdf)
31. Steve Neale – *Genre Theory* (2017). *Media Studies Guilsborough Academy*. [Online] <https://guilsboroughschoolmedia.wordpress.com/2017/08/26/steve-neale-genre/>
32. Szilas, N. (2003). *IDtension: a narrative engine for Interactive Drama*. *First International Conference on Technologies for Interactive Digital Storytelling and Entertainment* (pp. 80-87). Fraunhofer IRB Verlag. [https://www.academia.edu/3720831/IDtension\\_a\\_narrative\\_engine\\_for\\_Interactive\\_Drama](https://www.academia.edu/3720831/IDtension_a_narrative_engine_for_Interactive_Drama)
33. *The importance of storytelling in UI/UX design* (2023). *Nulab Blog*. [Online] <https://nulab.com/learn/design-and-ux/storytelling-in-user-experience/>
34. Veale, K. (2012). "Interactive Cinema" Is an Oxymoron, but May Not Always Be One. *Game Studies*, 12(1). <http://gamestudies.org/1201/articles/veale>
35. Yurtseven, N.B. (2023). *Form and Content in Interactive Film: An Analysis of Black Mirror: Bandersnatch*. *Filmvisio*, 0(2), 91-126. <https://doi.org/10.26650/Filmvisio.2023.0015>

## PSYCHOLOGICAL REHABILITATION OF DISTANCE LEARNING STUDENTS DURING WAR

**Maria Smetanska**

Doctor of Philology, Associate Professor at the Department  
of Language Training and Communication,  
Kyiv National University of Construction and Architecture, Ukraine  
e-mail: smetanska.mi@knuba.edu.ua, orcid.org/0009-0006-4363-3301

**Svitlana Rubtsova**

Doctor of Philosophy, Head of the Department of Language Training and Communication,  
Kyiv National University of Construction and Architecture, Ukraine  
e-mail: rubtsova.sv@knuba.edu.ua, orcid.org/0000-0003-4114-5874

### Summary

The war in Ukraine has forced many students to leave the country and continue their studies remotely. This study aims to analyze the problems faced by higher education students and provide them with recommendations on how to overcome the socio-psychological consequences through distance learning.

This study aims to identify ways to support students in restoring their psychological health, adapting to temporary living conditions and developing a positive outlook on their future. The study emphasizes the role of university professors in facilitating student access to educational and training programs and supporting socio-cultural integration in countries of temporary residence.

To achieve this, we examined the issues faced by displaced students and selected suitable methods and principles for working with them pedagogically. In particular, we employed scientific induction to help students understand the connections between social phenomena and processes; an empirical method based on online testing; and comparative analysis to activate a positive emotional state. We used an important method of interactive influence, such as conversation, to identify students' personal views. When preparing cultural and educational programs to help displaced students adapt to new conditions successfully, we took the following principles into account: an integrated approach to education; educating individuals as part of a team, involving students in the work of Ukrainian communities in other countries; and the unity of students' consciousness and behavior.

The study determined the effectiveness of these methods and measures of pedagogical action. Communicating with students who switched to online learning affirmed their civic position, improved their performance and enhanced their intellectual potential and mental health. The experience described in this paper will be useful for lecturer-mentors in educational institutions to use.

**Key words:** forced migration, distance learning, socio-psychological problems, principles of pedagogical action, counseling, adaptation, psychological recovery.

DOI <https://doi.org/10.23856/6908>

## 1. Introduction

The unprovoked war waged against Ukraine by the Russian Federation has led to significant changes in Ukrainian society. We have witnessed destruction, violence, injuries, massacres and tragic reports from many parts of the front line. This situation has continued for more than three years. Even in the early stages of active hostilities, reports at an expanded government meeting highlighted the enormous impact of the war on people's mental health (*Liashko, 2023*). All participants at the meeting emphasized the importance of implementing measures to improve public health on a large scale. Such measures were particularly pertinent for those forced to seek refuge outside their country (*Karamushka et al., 2022*). Forced migration has caused people to experience a stressful psycho-emotional state and a subjective feeling of anxiety, even when they are in a safe place. Students lost the opportunity to continue their education at Ukrainian educational institutions (*Bratsyun, 2023*). To continue their education, young people were forced to leave their previous places of residence and study remotely.

Faced with new and completely unusual circumstances, students encountered various difficulties. These were primarily economic and domestic problems, and an initial lower level of well-being (*Polyvianaia et al., 2025*). Not everyone was able to immediately secure housing favorable for studying. Many students only managed to solve their financial problems by finding additional, mostly unskilled work. Moreover, not knowing the language of the host country had a significant impact on both the adaptation process and the general mental state (*Kredentser, 2023*). This can lead to self-doubt, anxiety, despair and apathy in young people. Virchenko's work on mental health studied the main types of mental disorder and the prevalence of depressive symptoms among Ukrainian students during the war (*Virchenko, 2024*).

In psychological recovery practice, there is already a wide range of programs aimed at solving this problem (*Cogorno et al., 2023*). An important part of these programs is collective conversations, which bring people together based on common interests and encourage them to find ways out of difficult situations. Examples include the Dispositional Optimism Test, the Wiesbaden Positive Therapy Inventory, and the Resilience Test (*Kobzar et al., 2024*).

The efficacy of mitigating stress factors can be assured by taking into account interests, requests, and predilections. There is an urgent need to develop and implement programs to help Ukrainian forced migrants integrate into European communities (*Collie-Chamnet and Dribas, 2023*).

To improve the results of distance learning in their chosen specialty and help students overcome depression and psychological discomfort, lecturers at the Department of Language Training and Communication at Kyiv National University of Construction and Architecture have established individual communication with their students. To this end, they have selected literary and artistic events that have been tried and tested in educational work with students and adapted to their new social and living conditions as temporary migrants. Department members constantly monitored publications of research appearing in collections and journals over the past three years. From the works of teachers (*Senovska and Nestayko, 2025*), psychologists, sociologists (*Gorokhova et al., 2025*), ethnolinguists (*Bagan, 2024*) and physicians (*Bratsiun, 2022*), the lecturers-mentors have gleaned useful advice for their work. The methods and principles of pedagogical action proposed in the latest research were actively implemented in the preparation and delivery of training sessions and educational activities for the psychological rehabilitation of students in war conditions.



## 2. The formation of a harmoniously developed personality is the purpose of educational work

To the important functions of higher education pedagogy belong the theoretical study and description of pedagogical phenomena and processes; the analysis of cause-and-effect relationships; and the generalization and interpretation of pedagogical experience (*Strazhnikova, 2018: 10*). The teaching staff at the Department of Language Training and Communication recognize the effectiveness of combining these components harmoniously in educational work, resulting in the development of young people's personalities. Activities such as preparing evenings, meetings with artists, organizing exhibitions, celebrating memorable dates, concert programs, excursions and competitions lay the foundation for moral consciousness, self-awareness and responsibility.

Civil society, especially under the challenging conditions of martial law, presents significant challenges to higher education because the state requires patriotic young individuals willing to study and work for the benefit of their country. Contemporary researcher I. Ustymenko notes that patriotic education is currently a pedagogical category undergoing renewal (*Ustymenko, 2022*). An important aspect of this renewal is fostering a respectful attitude towards the native language, culture, and traditions; taking responsibility for the environment; contributing to the well-being of the nation; and aspiring to work for the benefit of one's homeland and its people (*Marchenko, 2022*).

The formation of young people's patriotic feelings requires them to realize the importance of their native language for the existence and unity of the nation. Therefore, lectures and practical classes place great importance on studying the difficult struggle of the best Ukrainian people for the right of the language to exist, spread, and develop.

In his ethnolinguistics study, Bahan (*Bahan, 2024*) notes the importance of formulating interesting and meaningful tasks that cater to students' interests. Taking such interests into account, the university prepares cultural and educational programs. After lecturers have explained the ideological essence and artistic means of the proposed works, students choose independently which one they will read on stage. These poems explore the role of language and its beauty and richness. As well as poems by renowned writers such as Oleksandr Oles, Maksym Rylsky, Dmytro Bilous, Lina Kostenko, Dmytro Pavlychko, Ivan Drach, Pavlo Movchan, Volodymyr Bazylevsky and Liubov Holota, students also present poems by their favorite authors during the discussion.

Events such as the collective writing of a radio dictation of national unity involving all participants in the academic process, holding a Ukrainian language Olympiad at the university, student research conferences and literary contests contribute to the formation of an active civic position. These activities raise the intellectual level, strengthen memory and develop creative abilities, thus strengthening students' authority among their peers and lecturers. They help young people to establish themselves and feel confident in the social environment. Members of the Department of Language Training and Communication also invite distance learning students to participate in these online events.

In difficult times for Ukraine, the unity of people, their adherence to ethical standards of behavior, the ability to live in accordance with humanistic principles, norms and rules of morality, which is of a universal nature, is especially needed (*Toftul, 2014: 80*). Examples of manifestations of such moral qualities are instilled on the examples of actions of prominent historical figures, characters of literary works, so the university organizes literary evenings, meetings with writers (*Akhmediyeva and Autayeva, 2024*). In preparing for such events, the

pedagogical method of *forming consciousness* is chosen. For example, in the last three years alone the most difficult for our country, a well-known politician and cultural critic Mykola Tomenko, author of the books *Seven Wonders of Ukraine* and *Alphabet of a Citizen of Ukraine*, has repeatedly delivered popular science lectures to teachers and students. His lectures on the lessons of Ukrainian constitutionalism, the works of Taras Shevchenko, Ivan Nechuy-Levytsky, and Oleksandr Dovzhenko are extremely relevant in today's environment. Presentations of new books by contemporary writers Vasyl Dobriansky, Tetyana Belimova, Olga Selipa, Andriy Kokotiukha, Oksamytkha Blazhevskha, and Serhiy Klimovych were organized. Their creative work has become a good model of behavior, an example for every young person to follow, even in the difficult times of martial law in the country.

Analyzing various areas of value formation in young people, L. Korinna identifies among others such as the emotional attitude of a young person to citizenship (*Korinna, 2009*). It is the language, literary and folklore educational activities at the university, in the houses of creative unions of Ukraine, and in museums and exhibition halls that shape this attitude, promote the intellectual and aesthetic development of young people. In addition to their instructive content, these events make an aesthetic impression due to the artistic design of the events and the presence of appropriate paraphernalia: national costumes, embroidered and woven towels, and folk art.

It is important to note that before each of these events, an artistically designed announcement is posted on the website of the Department of Language Training and Communication, inviting distance learning students to participate in them.

### **3. Mentoring distance learning students in their psychological recovery**

Students who have changed their place of residence due to the war and switched to online education remain members of the university community. They continue to study their chosen subjects, conduct research and complete individual tasks. As mentioned in the previous section, they are encouraged to participate in the organization and delivery of all literary and artistic events held at the university. However, lecturers are looking for new forms of pedagogical action for those who continue their studies remotely. After all, as O. Dubaseniuk rightly notes, innovations in pedagogy are connected with general societal processes, such as globalization and integration (*Dubaseniuk, 2009: 14*). The forced relocation of students to another country and the need to overcome the difficulties associated with transitioning to online learning have accelerated the process of humanization and the elevation of the individual to the highest social value. To improve the psychological health of students who are forced migrants, the Department of Language Training and Communication's main task is mentoring.

In order to communicate effectively with displaced students, teachers must study and take into account the various circumstances they face. It is important to understand which regions young people have moved from and the reasons behind their relocation. As Polyvianaia (*Polyvianaia et. Al, 2025*) admitted, whether the move was within Ukraine or abroad had a significant impact on mental health outcomes. It is also important to consider whether other family members are nearby, whether living conditions are adequate and whether there is access to educational literature. Regardless of the reasons for moving, however, anyone who has had to change their usual circumstances needs psychological support (*Shchootka, 2024*). According to lecturers and advisors, students should be helped to adapt to new conditions and take the most optimal steps for self-assertion in a new social environment and cultural space.

Even communicating with lecturers and friends from the university can contribute to a sense of belonging in an environment that was previously familiar, and inspire optimism.

Lecturers from the university's Department of Language Training and Communication analysed information about opportunities for young people to continue their education and participate in social events. Most of them have temporarily left for European countries. As L. Tallaj notes in her article about students' mental health problems, European educational systems have demonstrated empathy and operational flexibility in meeting the academic needs of displaced young Ukrainians without disadvantaging them (Tallaj, 2024). Under favorable circumstances, they have opportunities for self-realization, revealing their knowledge and talents, and for the active involvement of their organizational skills and psychological regulation, as they did in their homeland. According to the EPRS, it is European countries that have received the largest number of Ukrainian students. As of the end of March 2022, these countries were Poland (26,938 students), Germany (6,319 students), the Czech Republic (3,132 students), Slovakia (2,911 students) and Austria (1,450 students) (Katsarova, 2022). Over time, this number has increased significantly. For example, Poland, which is particularly friendly towards Ukraine, has seen a significant increase in Ukrainian students: currently, 48,150 Ukrainian students are studying there, which is 21,212 more than in the first months of the war (Savchyshyn 2024).

In many countries, Ukrainian young people participate in cultural and artistic programs, learning about the traditions of other nations while also promoting Ukrainian culture. While staying in countries that have provided them with temporary asylum, we encourage our students to play an active role in celebrating national holidays and in literary and musical events dedicated to the work of renowned writers, artists and composers. Ukrainian communities exist in many European cities and towns. Members of these associations have made it a tradition to celebrate national holidays, organize calendar events and implement folk art traditions. In the study of the formation of civic values, L. Korinna considers the 'emotional attitude to citizenship' to be an important factor (Korinna, 2009: 486). Cultural and educational events contribute the most to the emotional perception of the world. Therefore, advising students to participate in preparing evenings, exhibitions, excursions and meetings with artists is relevant, as it stimulates thought, improves memory and helps young people integrate into the environment of both compatriots abroad and the local population.

Individual mentoring is a form of pedagogical influence that allows lecturers to expand students' knowledge and strengthen their competence and familiarity with the material. Thus, ahead of National Flag Day and Independence Day celebrations in Ukraine, information about the role of the blue and yellow Ukrainian flag in creating a living chain of unity, even before the adoption of the Act of Independence on 21 January 1990, is highly relevant (Viatrovych, 2023: 476). Examples of the combination of blue and yellow colours in the works of Ukrainian artists can be found in reports on the meaning of national symbols for Ukrainians (Smetanska, 2024). During Taras Shevchenko celebrations, lecturers send students videos posted on the university's website featuring readings of the poet's works translated into other languages by KNUBA foreign students (Khomenko, Biletsky, 1989). To introduce participants to Shevchenko's artistic heritage, we recommend reproductions of his own works and those of his contemporaries, as these provide realistic depictions of life at the time (Yatsiuk, 2004). We recommend materials about the creativity of the young Taras for participants in such meetings (Litvinova, Kotukova, 2019: 21–22) and about the originality of his poetic handwriting (Zhovnir et al., 2024). Demonstrating excerpts from feature films and documentaries about Shevchenko would also be successful. Active participation in the organization and delivery of artistic events enables students to broaden their horizons, realize their potential and enhance their standing

within Ukrainian communities. All of this contributes to their psychological recovery in conditions outside their home country.

University mentors advise students to actively integrate into the socio-cultural space of their country of temporary residence in order to assert themselves. It's not just about being grateful for shelter. Every young person, especially a student, naturally strives to acquire new knowledge and experience aesthetic pleasure. In order to successfully integrate into a different social environment, Ukrainian youth must demonstrate a high level of education through their actions and reveal moral qualities such as respect for others, tolerance and compassion. After all, a person is only guided by the highest, unconditionally universal values when they are guided by moral motives (*Blikhar et. al, 2018: 26*). Adherence to the principles of moral and ethical behavior will help temporary migrants gain credibility and find friends and advisors in their new environment, enabling them to learn more about the host country's peculiarities. This will greatly deepen Ukrainian students' general knowledge, as well as contributing to their self-affirmation and strengthening their mental health.

As Y. Rubinska rightly notes, every displaced person runs the risk of facing psychological problems and unfamiliar conditions, creating a stressful situation. This requires active interaction with the environment (*Rubinska, 2024*). To maintain psychological balance and avoid feelings of alienation, mentor lecturers advise their students to establish such interactions by studying the peculiarities of the places in which they are staying. When adapting to temporary living conditions, it is important to familiarize yourself with information about the host country, such as its history, political position, geographical location, natural resources, population, mentality, artistic values and famous people (*Mykhaylyshyn et al., 2024*).

Thus, given T. Horokhova's opinion that Germany focuses on structured institutional support and policy-driven initiatives (*Gorokhova et al., 2025*), mentors advise students to participate in events and actions initiated by government agencies. There is already a result. In August 2024, students studying in Germany attended a solemn meeting of Hof residents with Maria-Agnes Strack-Zimmermann, a German federal government representative and great supporter of Ukraine. Her optimistic speech impressed the Ukrainian students in attendance.

Our students also took our advice on which artistic achievements in which country are worth seeing into account. Students currently in Belgium familiarized themselves with a series of paintings by the outstanding Flemish artist Peter Paul Rubens in Antwerp Cathedral. For those temporarily based in Vienna, lecturers recommended attending regular music festivals showcasing the works of renowned Austrian composers. Those in Ljubljana were recommended materials about the social activities and literary heritage of France Prešeren, whom Slovenes compare to Taras Shevchenko for the power of his poetic imagery. Similar practices are conducted for students in Poland, particularly in Warsaw, Krakow and Szczecin. Students from the Faculty of Civil Engineering at the university, who study remotely from the Polish city of Wrocław, participated in a festive procession and a rally on Ukraine's Independence Day together with other members of the Ukrainian community. The students themselves report that such actions are extremely necessary and memorable. As O. Dubinina states, it is important to provide pedagogical support to Ukrainian students to help them assimilate new values while maintaining their national identity (*Dubinina, 2025*). Young people's desire to learn about and study the languages of their host countries also fosters positive attitudes towards Ukrainian students among the local population.

According to N. Senovska and I. Nestayko, it is important to apply the principle of educating individuals as part of a team in pedagogical work (*Senovska and Nestayko, 2025*). At the celebration of the Day of Ukrainian Embroidery in Amberg, Germany, the consultants provided

the participating students with information about the features of geometric and floral embroidery designs from different regions of Ukraine, as well as the symbolism of the combination of red and black and blue and yellow. The celebration featured the song 'Two Colors' by Taras Shevchenko National Prize laureates: composer Oleksandr Bilash and poet Dmytro Pavlychko. This song has been popular for six decades. The active participation of Ukrainian students and their demonstrated knowledge of their own literature and music strengthens their authority and gives them confidence in their moral strength. It also promotes their integration into a different social environment and ensures their psychological balance. Students' participation in cultural and artistic events is also facilitated by workshops held by Ukrainian communities in many countries, teaching skills such as making motanka dolls, crocheting, painting or decorating Easter eggs, and embroidery.

Lecturers-consultants advise students in the Baltic States to popularize Ukrainian folk art and study Latvian and Estonian folk traditions. Lithuania, Latvia and Estonia are known to be friendly towards Ukraine due to their favorable policies and affordable educational opportunities (*List of Universities Helping Ukrainian Students, 2022*). Ukrainian national holidays are also celebrated at a high level there, with the use of state symbols approved by the Constitution of Ukraine on 28 June 1996. Lecturers suggest popularizing information about these symbols: The national flag of Ukraine is blue and yellow, the national anthem is the first verse of a solemn song created in 1865 by the composer Mykhailo Verbytskyi and the poet Pavlo Chubynsky, and the state emblem is a trident, the sign of the princely age of Volodymyr the Great.

Many students temporarily abroad participate in the celebration of Ukrainian national holidays and folk rituals. Online consultant lecturers familiarize them with the meaning of the symbols associated with these events. For example, the star carried by carolers symbolizes the Star of Bethlehem, which announced the birth of Christ to the world. The *didukh* on the Easter table symbolizes the harvest and honors an ancestor, while the fire wheel on Kupala Night represents purification from evil. Preserving and popularizing the traditions of their people among other ethnic groups helps students to feel connected to their historical and cultural heritage, to feel proud of their homeland and to increase their optimism and psychological balance.

#### 4. Discussion of results and planning of further activities

The issue of the psychological rehabilitation of students who have switched to distance learning due to the threat of war remains relevant. At meetings of the Language Training and Communication Department at Kyiv National University of Construction and Architecture, lecturers regularly report on their work with individual students. Colleagues share their experience of communicating with these students. To further support young people living in other countries, the department's faculty will continue the work described in previous sections. Meetings with psychologists are periodically held in the reading room of the KNUBA University Library, where lecturers receive guidance on working with displaced students. The experience of psychologists and practicing lecturers is studied in the programs. Webinars, talks and discussions are held to address the issue of how effectively students adapt to the conditions of temporary migration.

Mentor lecturers advise students to remain integrated into the cultural life of their Ukrainian university by participating in international cooperation between higher education institutions. Several effective strategies have been developed for this purpose. One of these is the International Mobility Program, which enables students to participate in exchange programs while maintaining ties with their home universities (*Melnyk et al., 2024*).



The department's faculty advise students to join 'Virtual Clubs and Communities' that bring together young people with shared interests in literature, history or art. Participation in these communities gives students the opportunity to maintain contact with their cultural roots. "Online Cultural Events", such as festivals, webinars, and online discussions organized between universities, are also important. Ukrainian students who are forced to stay abroad can participate in these events and share their experiences (Zhurchenko, 2024). Participation in these programs helps students to affirm themselves and promotes psychological recovery.

## 5. Conclusions

In order to provide psychological support to students forced to switch to distance learning, lecturers from the Department of Language Training and Communication at Kyiv National University of Construction and Architecture analyzed research from lecturers and psychologists. They identified the most effective methods for working with students remotely to improve their psychological health. They identified effective methods of pedagogical action to help students assimilate knowledge, instill moral and ethical behavior in young people, broaden their worldview, and foster humanistic qualities. When preparing for literary and artistic events, department lecturers and student government representatives chose the most effective methods and principles of pedagogical action. The process of involving distance learning students in cultural and artistic events was adapted to the circumstances. The socio-economic conditions and problems faced by the students were taken into account. The peculiarities of the host countries' state and political systems, as well as the presence or absence of Ukrainian communities in the students' places of residence, were considered. Familiarizing lecturers with this information about each student ensured an individualized approach to mitigating the negative effects of stressful psychosocial conditions.

The lecturers chose methods for the psychological rehabilitation of students, which strengthened their self-confidence and conviction in the importance of their role in rebuilding an independent Ukraine and its prominent place in the European community. Consequently, students' participation in cultural and educational events organized by Ukrainian communities and international student associations was effective. Lecturers-mentors played a positive role in preparing these events by assisting in the selection of scientific and popular science literature and by sending relevant scientific and fiction literature, photos, and videos. The results of communication between lecturers and students included increased intellectual growth, aesthetic development, and psychological recovery.

Considering the positive effects of working with students, university professors continue to familiarize themselves with the research of lecturers and psychologists to implement educational experiences in higher education institutions in Ukraine and abroad. They also plan to develop linguistic, literary, and folklore programs to study the history and culture of the Ukrainian people with foreign students at the university. They will continue to organize virtual events under international interuniversity relations programs.

## References

1. Akhmediyeva, K., Autayeva, F. (2024). *The role of folklore in the upbringing of patriotism of primary school children with hearing impairments. Armenian Journal of Special Education*, 8, 18-27. DOI: 10.24234/se.v8i2.31.



2. Bahan, M. (2024). *Developing research competence in prospective teachers of Ukrainian language and literature through course "Ukrainian ethnolinguistics"*. *Visnik KNLU, Pedagogy and Psychology*, 40, 9-21. DOI: 10.32589/2412-9283.40.2024.309794. [in Ukrainian]
3. Blikhar, V. S., Oleksiuk, M. M. (2018). *Ethics and aesthetics*. Lviv: Aral. [in Ukrainian]
4. Blikhar V. S., Olekyuk M. M., Haivaroniuk N. V., Andrushko L. M. 1998. *Ethics and Aesthetics*. Lviv: Aral, 205 p. [in Ukrainian]
5. Bratsyun, O. P. (2023). *Socio-demographic and emotional-psychological characteristics of Ukrainians who left Ukraine as a result of Russian military aggression*. *Therapeutics*, 3(4), 56-62.
6. <https://terapevtyka.com.ua/index.php/journal/article/view/122> [in Ukrainian]
7. Collie-Chamnet, A. V., Dribas, S. A. (2023). *Social and psychological problems of refugees from Ukraine in Switzerland in the first year of the war*. *Scientific Bulletin of Kharkiv State University*, 3, 42-54. DOI: <https://doi.org/10.32999/ksu2312-3206/2023-3-6> [in Ukrainian]
8. Cogorno, L., Smithbauer, S., Beck, C., Zaporozhets O. (2023). *The contributing factors for psychology students continuing higher education amid war*. *Continuing Professional Education: Theory and Practice*, 77, pp. 18-31. doi:10.28925/1609-8595.2023.4.2.
9. Dubaseniuk O. 2009. *Innovative educational technologies and methods in the system of professional and pedagogical support*. *Professional pedagogical education: innovative technologies and methods*. Zhytomyr: ZHYTOMYR: ZHDU, pp. 14-48. [in Ukrainian]
10. Dubinina, O. (2025). *Value concepts and their role in the socialization of Ukrainian students in Polish schools*. *Bulletin of Postgraduate Education*, 31, 62-77. DOI: 10.58442/3041-1831-2025-31(60),62-77. [in Ukrainian]
11. Gorokhova, T., Oleinikova, O., Matveieva, O., Navumau, V. (2025). *War took my home, but not my future: adaptation of war-affected Ukrainian students in Australia and Germany*. *Innovation: The European Journal of Social Science Research*, 38, 50-69. DOI: 10.1080/13511610.2025.2469667
12. Karamushka, L.M., Kredentser, O.V., Tereshchenko, K.V., Delton, Y., Arefniya, S.V., Paskevskaya, I.A. (2022). *Study on subjective well-being of different groups of population during the 2022 war in Ukraine*. *WiadLek*, 75(8), 1854-1860. doi: 10.36740/WLek202208107. PMID: 36089869.
13. Katsarova, I. (2022). *EPRS, European Parliamentary Research Service. Samy Chahri Members' Research Service PE 729.318* [https://www.europarl.europa.eu/thinktank/en/document/EPRS\\_ATA\(2022\)](https://www.europarl.europa.eu/thinktank/en/document/EPRS_ATA(2022))
14. Khomenko, B. V., Biletsky, A. O. (1989). *Shevchenko T. "Testament" in the languages of the peoples of the world*. Kyiv: Higher school. ISBN 5-12-000472-5. [in Ukrainian]
15. Kobzar, A. Y., Smetanska, M. I., Makoviy, M. G. (2024). *Features of psychological well-being of refugees in Ukraine*. Kyiv. ISBN 978-617-8171-16-2. <https://repository.knuba.edu.ua/handle/123456789/12341>. [in Ukrainian]
16. Korinna L.V. (2009). *Technology of Formation of Civic Values in the Educational Process of the Pedagogical Lyceum*. *Professional Pedagogical Education: Innovative Technologies and Methods*. Zhytomyr: ZhDU, pp. 484-510. [in Ukrainian]
17. Kredentser, O. V. (2023). *An empirical study of the psychological problems of Ukrainians in Germany due to the war*. *Organizational psychology. Economic Psychology*, 1(28), 45-55. <https://doi.org/10.31108/2.2023.1.28.5> [in Ukrainian]
18. Levchuk, L. T., Kucheryuk, D. Y., Panchenko, V. I. (1997). *Aesthetics*. Kyiv: Higher school. ISBN 966-642-318-9. [in Ukrainian]

19. Liashko V. (2023). *Psychological services should be affordable, high-quality and free of charge*. Government portal. Ministry of Health of Ukraine. <https://www.kmu.gov.ua/en/news/psykholohichni-posluhy-maiut-buty-dostupnymi-iakisnymi-ta-bezoplatnymi-viktor-liashko>
20. *List of Universities Helping Ukrainian Students*. (2022). Retrieved from <https://erudera.com/resources/list-of-universities-helping-ukrainian-students>
21. Litvinova I. M., Kotukova T. V. (2019). *Ukrainian language for image and career*. Kyiv: Morning. [in Ukrainian]
22. Marchenko Y. (2022). *Upbringing patriotism in children as an urgent problem of modern upbringing*. In *Tools of upbringing in modern educational institutions: implementation of creative and socially significant programs, projects: collection of materials of scientific and practical conference* (pp. 101-106). Kyiv. <https://ipv.org.ua/wp-content/uploads/2022/04/Zbirnyk-tez-konf.-28.04.2022.pdf#page=101>. [in Ukrainian]
23. Melnyk, Y., Stadnik, A., Mykhaylyshyn, U., Vveinhardt, J., Frias, C., Pypenko, I. (2024). *Mental health and life satisfaction of university students affected by war*. *International Journal of Science Annals*, 7, 1-11. doi: 10.26697/ijsa.2024.2.6.
24. Mykhaylyshyn, U., Stadnik, A., Melnyk, Y., Vveinhardt, J., Oliveira, M. & Pypenko, I. (2024). *Psychological stress among university students in wartime: A longitudinal study*. *International Journal of Science Annals*, 7, 27-40. doi: 10.26697/ijsa.2024.1.6.
25. Polyvianaia, M., Yachnik, Y., Fegert, J., Sitarski, E., Stepanova, N., Pinchuk, I. (2025). *Mental health of university students twenty months after the beginning of the full-scale Russian-Ukrainian war*. *BMC Psychiatry*, 25, 1-15, doi: 10.1186/s12888-025-06654-1.
26. Rubinska, Y. (2024). *Investigating psychological struggles of ukrainian migrant students and teachers abroad amidst war*. *Archives des Sciences*, 74, 140-149. doi:10.62227/as/74220.
27. Savchyshyn M. 2024. RAD-ON Portal, <https://www.sestry.eu/statti/skilki-ukrayinskih-studentiv-navchaietsya-u-polshchi> (02.02.2024) [in Ukrainian]
28. Senovska, N., Nestaiko, I. (2025). *Formation of patriotism as a theoretical and practical problem of modern Ukrainian education*. *Spiritual and intellectual upbringing and teaching of youth in the XXI century*, 7, 170-176. DOI: 10.58962/2708-4809.siuty.2025.26
29. Shchotka, O. (2024). *Psychological well-being of personality in continuous war and its management*. *Psychological Studies*, 1, 151-158. doi: 10.32782/psych.studies/2024.2.21.
30. Smetanska, M.I. (2025). *The importance of state symbols of Ukraine for the education of patriotism of student youth*. In *Actual problems of the educational process in the context of Ukraine's European choice: VII International Conference of KNUBA* (pp. 416-422). Kyiv: KNUBA. <https://repository.knuba.edu.ua/handle/123456789/14596>. [in Ukrainian]
31. Strazhnikova I. (2018). *Pedagogy of Higher Education*. Ivano-Frankivsk: NAIR. 120 p. [in Ukrainian]
32. Tallalay, L. (2024). *Measures to support ukrainian refugees' education*. *International Journal of Innovative Science and Research Technology*, 1, 1957-1963. DOI: 10.38124/ijisrt/IJIS-RT24AUG1395
33. Ustyenko I. (2022). *Patriotic education of student youth, outlined by the war*. *Pedagogical Bulletin*, 1-2, 26-29. [in Ukrainian]
34. Virchenko, V. (2024). *Mental health and productivity of Ukrainian students in the time of war*. 370-378. doi: 10.17721/3041-1491/2024.11-48. [in Ukrainian]
35. Vyatrovych, V. (2023). *Ukraine. History with the stamp "Secret"* Kharkiv: KSD. ISBN. 978-617-15-1126-2 [in Ukrainian]

36. Yatsiuk V. (2004). *Face to face with Shevchenko. Iconography of 1838-1861*. Kyiv, 212. [in Ukrainian]
37. Zhovnir O. M., Smetanska M. I., Makovii M. H. (2024). *The role of epithets for colors in Taras Shevchenko's poetry*. In *Proceedings of the 10th International scientific and practical conference. Perfect Publishing* (pp. 263-267). Vancouver, Canada. URL: <https://sci-conf.com.ua/x-mizhnarodna-naukovo-praktichna-konferentsiya-innovative-development-of-science-technology-and-education-4-6-07-2024-vankuver-kanada-arhiv/>.
38. Zhurchenko, T. (2024). *Everyday Europeanization and bottom-up geopolitics at the Ukrainian-Polish Border*. *Geopolitics*, 1-43. DOI: 10.1080/14650045.2023.2283488
39. Toftul M. G. (2014). *Modern Dictionary of Ethics*. Zhytomyr, 416 p. [in Ukrainian]

## POETIC TRANSLATION: CONCEPTUAL APPROACH IN LINA KOSTENKO'S VERSE *WINGS*

**Olga Taranenko**

PhD, Associate Professor,

Volodymyr Dahl East Ukrainian National University of Kyiv, Ukraine

e-mail: jetsetter888@ukr.net, orcid.org/0000-0001-9368-2036

### Summary

In the proposed scientific investigation, the role of conceptual translation in poetic discourse is revealed. The famous verse “Wings” of an outstanding Ukrainian poetess Lina Kostenko has been translated from Ukrainian into English and analyzed emerging into deep senses of the poem. The poetic translations of the verse were presented and compared taking into consideration connotative side of main verse’s elements. The works have been done by the professional translators from Ukrainian into English and the prize-winners of All Ukraine translation competition held on the base of Volodymyr Dahl East Ukrainian National University. The main conceptual components were the following: freedom, sky, heights, truth, clarity, love, devotion, truth, heaven, honor, poetry, dream. The above components helped to convey the inner meaning of the cultural phenomena into English from Ukrainian that reflected the differences and similarities in the worldview of these nations. Also the translators tried to preserve individual style of Lina Kostenko while translating the verse for making it as close as possible to the original. The suggested approach can be useful while translating text, poetic in particular, for making translation not only exact, but creative at the same time.

**Key words:** literary translation, concepts, translation peculiarities, poetic text, worldview.

DOI <https://doi.org/10.23856/6909>

### 1. Introduction

In our scientific investigation we will concentrate on the peculiarities of Lina Kostenko’s famous poem “*Wings*” translation and its conceptual interpretation.

Poetic translation is one of the most challenging and interesting ways to convey senses from one language to another. This is easy and difficult at the same time. It is easy, because this is real diversity of senses comparing to scientific of law translation. But it is complicated, because this is hard to translate sometimes controversial sense with great influence of individual poet’s style; the realities of one language into another taking into consideration cultural, national, psychological issues and difference of worldview.

This is vital to keep balance between correctness and poetic individuality. The most important for the translator of a poetic text is to adjust the meaning and keep the rhyme at the same time. This is desirable if the translator has poetic talent to preserve the rhyme. This is the first important moment that is obvious, but still sometimes violated.

The second moment is of a paramount importance – how to transfer meaning not forgetting about exact sense. In this case conceptual translation can be in help.

Leaning and comparing main characteristics of the concepts in the poem can greatly help to translate the right meaning that will match to the worldview of the language recipients. No

doubt that concepts in different worldviews can have some shades of meaning that are important to convey.

Paul R. Carlile in his work *Transferring, Translating and Transforming* states that for keeping translation smooth this is necessary to keep such method as *integrative framework* consisting of three the above elements for overcoming difficulties in translation: Pragmatic transformation, semantic translation and syntactic transfer (Carlile, 2003: 558).

According to this approach this is clear to know how to translate the text of any type. This really works and helpful, but speaking about poetic translation in particular this is vital to take into consideration worldview of both cultures (Ukrainian and English in our case). This is possible to do applying conceptual creative method in particular. In the focus of our interest is the “the transition of Syntactic to a semantic Boundary that occurs when novelty makes some differences and dependencies unclear or some meaning ambiguous”. Semantic is strongly connected with the theory of concepts (Carlile, 2003: 558).

## **2. History of the poem “Wings” and its meaningfulness in the creative diversity of Lina Kostenko as a romantic poetess**

Let us begin with a brief acquaintance with the outstanding personality of Lina Kostenko – alive legend of contemporary Ukraine. Nowadays Lina Kostenko is the most prominent modern Ukrainian female poetess. She was born in the city of Rzhyschiv in 1930. She obtained her education in the Moscow Literary Institute in 1956. Her first verses collection were “*The Rays of Earth*” (1957) and “*The Sails*” (1958). These verses were highly appreciated and accepted by readers and colleagues. Her next collection named “*The Journeys of the Heart*” written in 1961 declared her as the master of Ukrainian poetic tradition. Unfortunately, because of her uncompromised position against Soviet authorities her works were banned and persecuted for many years. Lina Kostenko is the Professor Emeritus of the Kyiv-Mohyla Academy; the Honoured Doctor of the Lviv and Chernivtsi National Universities. Lina Kostenko is a laureate of the Shevchenko Award and the awards of the Antonovych Foundation (USA), the Petrarka Award (Italy) and Olena Teliha Award (Kostenko, 2025). Her poems have been translated in European languages,

In our research we will concentrate on the analysis of “Wings” poetic translation from Ukrainian into English. We will present its analysis on several stages – from the translation of the known masters of this art and the translation of the students who are just making first steps in the translators’ carrier. This is important to emphasize that this task was given in frames of All-Ukraine literary competition and the best nominees have been chosen. Literary treasure of Lina Kostenko must be known as widely as possible and with the help translation of “Wings” into English this will promote this poem tremendously. Before emerging into creative analysis in the poem let’s highlight the pre-history of this masterpiece in brief.

History of the poem “Wings” has romantic background. The poetess created it in 1958 in the city of Shchetsyn when she was about to move to Poland with her beloved man Yezhy Pakhliovsky and had hesitations about this serious step. This poem is a masterpiece in her verses collection “*Travels of Heart*” (Kostenko, 2025). The main idea for this poem of spiritual search of a human, prevailing of spirit over material world and values. In the concept of *spiritual wings* of a human the poetess emphasizes that real strength, power and freedom can possess a human who thinks wider than everyday routine and small matters.

This is about flight of higher values like poetic creativity, thoughtfulness, imagination and willingness to see more than the majority of people. Wings as the poetic symbol of real

freedom that was practically impossible in the USSR where she had to live this period of her life. Wings embody spirit, freedom, love, faithfulness, poetry and dreams. *Wings* is a powerful symbol of freedom that all Soviet people were deprived. This poem didn't rise much of struggle, but embodied freedom that is the essential part of every human being. Freedom – this is not about material, this is the power of the spirit and desire to emerge into something transcendent, mystical and spiritual.

This is vital that the poetess chose the wings of a bird (physical level) to show that a human who has urge to be over the routine of everyday life can also have wings of fantasy, freedom and love. This poem has always been in the center of attention of translators because of several layers of senses, some complexity of interpretation and real Ukrainian spirit, because for any Ukrainian freedom is the key of existence. With the original poem “*Wings*” in Ukrainian you can make acquaintance in this source (Kostenko, 2025).

### 3. Poetic Translation and Conceptual analysis

In general, poetic translation requires special approach and more creativity than the translation of any other genre. The best way will be to use the combination of conceptual analysis and creative approach in this case. If the translator also has poetic talent – this will be the best way to transfer all sense and to immerse the reader into the inner world of the poetess.

Let's consider the main concepts that contain this relatively short verse. It is notable to say that this poem is fulfilled with concepts and hidden senses on semantic level. This is seeming easy to transfer the meaning into English, but the meanings can be different in worldview of Ukrainians and English-speaking people. Let's specify the conceptual elements of the poem.

The image of *wings* is meaningful itself. For a bird this is obvious to have wings, this is natural for it to fly, this is the basic ability of a bird (truth of a bird). For the human this is possible only to speak figuratively about such ability. So, for the human this is possible to fly only on the wings of *truth, virtue, trust, devotion in love*. Conceptual element *heaven* here means spirituality, a superpower to fly on the wings of fantasy or dreams.

Poetess means the wings of aspiration and inspiration, especially knowing the circumstances of soviet regime where she had to live and fight. Her weapon is her poetry, her word, her song of the soul. These are real wings of a human. Her verse is profoundly metaphoric and extremely interesting for translation.

### 4. Conceptual analysis of “Wings” in the interpretation of known translators from Ukrainian into English

Before analysis of the above poem by the translators-students this is worth to highlight the works of professional translators who dedicated their efforts to make “*Wings*” in particular and many other Lina Kostenko's verses known among English-speaking readers.

One of the most outstanding ambassadors of Ukrainian literature into English-speaking world was Vera Rich (Faith Elizabeth Rich) – British translator, journalist and a great friend of Ukraine who was born in London and devoted a substantial part of her life to making poetic translations of Taras Shevchenko, Lesia Ukrainka, Ivan Franko and Lina Kostenko's verses into English. Overall, she translated more than 47 Ukrainian poets into English for English-speaking people to know the pearls of Ukrainian poetry. She can be acclaimed as the person who fully accepted Ukrainian culture, customs, traditions and moreover – poetry. Unfortunately, like many other talented people who supported Ukrainian identity in the period of the USSR, Vera



Rich had been under the ban and oblivion during 30 years.

Later, in independent Ukraine, her literary translation works were highly evaluated by both Ukrainian and British colleagues. In 1996 Vera Rich was awarded by the most honorable Ivan Franko Prize. When she was alive she answered the question why she loved Ukraine so much: "In my case I've been working for Ukraine, cried about Ukraine, was happy and laughed for Ukraine during 50 years ...If this is not love? What else this can be"? (*Brytanska perekladachka*, 2025).

In her translation works she devoted much to Lina Kostenko's poems, feminine and strong at the same time. These verses reflected poetess's devotion to Ukraine, its soul and features that are significant for our nation (*Brytanska perekladachka*, 2025). Among known professional translators of Lina Kostenko's verses is Michael M. Nayden – an American writer, translator, Professor of Slavonic Studies in Pennsylvania University.

Also the bright example of such interpretation is the work of John Weir who was Canadian journalist, publicist and translator. He was of Ukrainian-Polish descent, so, despite the fact that he wasn't born and raised in Ukraine, he was able to transfer the main concepts of "Wings" in his translation and in his professional activities he was strongly connected with Soviet Union and later with Ukraine (Kyiv). He wrote poetry himself and also translated other outstanding Ukrainian poets into English like Taras Shevchenko, Lesia Ukrainka, Ivan Franko and others (*Weir*, 2025).

Let's consider his translation of "Wings":

*But also **true winged** soil is not necessary.*

*Earth is not, it will be **heaven**.*

*No field, it will be done.*

*No steam, it will **cloud**.*

*This is probably true bird ...*

*But what about the man? And what about the man?*

*He lives on the ground. I do not fly.*

*A wing has. A wing has!*

*They are the wings, not down, now, "I*

*And of **truth, virtue and trust** "me.*

*Who – with **fidelity in love**.*

*Who – with **eternal aspirations**.*

*Who – with **sincerity to work**.*

*Who – with **generosity to care**.*

*Who – the **song, or hope**,*

*Or with poetry, or dreams.*

*Man allegedly does not fly ...*

*A wing has. A wing has (*Weir*, 2025).*

Here we can observe such main concepts of the poem that were transferred from the original text:

- *Freedom (wings of a bird, a bird can fly);*
- *Heaven (with clouds);*
- *truth (of a bird, of a human);*
- *Wings of Humans (humans can't fly, but they have wings of positive moral qualities)*
- *Honor*
- *Trust*
- *Hope*

- Poetry
- Dreams
- Living with Dreams (far from real life).
- Love in Fidelity

In the J. Wier's poetic interpretation we can observe such concepts that coincide in their meaning with Lina Kostenko's original verse. We can consider such elements as *truth, virtue, trust, generosity, poetry, dreams*. Interesting to note that in the last line J. Weir interpreted not wings in plural, but *a wing has* – meaning that for the human wings – this is a new level of spirituality and this is hardly possible to reach this level for the ordinary human. So, this is like pursuing the dream. This interpretation shows that *wings* as a symbol of liberty and freedom can't be reached completely for the human being, but this is worth trying to pursue this goal anyway. J. Wier's translation is very close to the original verse and it reflects the main conceptual ideas to transmit for the reader.

The majority of the mentioned concepts are common for both nations – Ukrainian and Canadian in their worldview. We shouldn't forget that J. Weir in his identity combined English with Ukrainian, so he was the best presentative who could give the full impression about Ukrainian worldview to the English-speaking reader in the frames of this meaningful verse.

### 5. Conceptual analysis of “Wings” in the interpretation of XIV All-Ukraine Translation Competition prize-winners

Translation of the 1<sup>st</sup> prize winner Victoria Valchuk, Kyiv City, Ukraine

Lina Kostenko

*Wings*

*It's true that the birds do not need steady ground,  
with nowhere to go, they can always be found  
rushing fast with the wind, spreading wings in the flight,  
their friends – foggy clouds, their partner – the sky.*

*The destiny of every bird is to fly,  
but are birds the only ones meant to reach heights?*

***We're human, and although deprived of the wings,***  
*sometimes we fly higher than every bird dreams.*

*The wings that we do have, they are made of feathers  
of honesty, trust, family get-togethers,  
of empathy, life-lasting urge to break through,  
of evergreen love for whatever you do,  
of hope, of a song someone sings in the streets,  
of a poem that elevates lonely heartbeats.*

*A human can't have the same wings as a bird,  
yet our wings take us higher than ever explored (Khudozhnie slovo, 2020: 17)*

The first prize winner had a very interesting interpretation of “Wings”. In her translation she gives preference to the lexeme *sky*, not *heavens*. The student-translator pays attention to the main ability of a bird – to fly and to feel freedom and happiness. She emphasizes that the human is “*deprived of the wings*”, but still can fly higher than any bird with *strength* of his/her *imagination, poetry, dreams*. She gives really romantic interpretation – like “*evergreen love*”, “*empathy*”, “*family get-together*”.

She broadens the meaning of the verse and suggests to the reader that *wings* can consist

of *love*, *affection* and *hope*. She deeply emerges into the mood of Lina Kostenko, the translator felt that when the poetess created her verse, she was in love. The translator could feel through the lines this atmosphere and gave her young, fresh interpretation, “*the poem that elevates heartbeats*”. In this interpretation we can analyze metaphoric *wings* more like “*wings of love*” than “*wings of freedom or spirit*”. This translation is very feminine and deep in our opinion. Also it describes eternal concept of *love* that is common in the worldview of both nations – Ukrainian and English-speaking.

Translation of the **2<sup>st</sup> prize winner Yulia Bozhenko**, Slovyansk City, Ukraine

Lina Kostenko

*Wings*

*When one has wings, there is no reason of the ground,*

*As well as land, when **sky**'s been found.*

*One needs no field if one is as still as willed.*

*One needs no pair when **clouds** are floating in the air.*

*It is the **truth** of birds indeed*

*And what's for human when he's in need?*

*These earthborn people who never fly*

*But have their wings to reach the sky!*

*The wings that made without fluffy feeling*

*But made of **truth and trust**, by **lack of double-dealing**.*

*The wings that made of **love's devotion***

*And made of **endless of emotion**,*

*They're made of **labor in its glory***

*And made of **charity** and worry,*

*They're made of **hope** and a sound*

*Or made of **poems and dreams** around.*

*It seems like people never fly*

*But have their wings to reach the **sky** (Khudozhnie slovo, 2020: 18).*

The second prize winner offered such translation that gives us the concept of wings as the phenomenon made of *trust and clarity* on the one hand and *love and devotion* on the other hand; the student-translator used an interesting element “*lack of double-dealing*” that means the priority of truth for the person who has imaginary wings and full of high spiritual ideas. This aspect seems to us to be very new in the interpretation and shows that high level of spirituality can be combined with dirty games or cheating.

Also the translator underlines value of *labor* (*labor is glorious*) and of kind heart (*wings... made of charity*). This interpretation is new as well, can be described as unusual and gives new connotation in understanding of the verse. All in all, the translator kept the main idea and interpreted it for English-speaking read in a new and dignified way. The translator could transfer the sense of the verse deeply enough also because Ukrainian is her mother tongue and conveying of main poem's concepts is relatively easy for her.

Translation of the **3<sup>rd</sup> prize winner Solomiya Tsvirla**, Ternopil City, Ukraine.

Lina Kostenko

*Wings*

*That's really true, **the wingy people** don't need grounds*

*They don't have land and stay in **clouds**.*

*They don't have home but got some **freedom***

*They don't have love but live in **heaven**.*

That's probably about a **bird's truth**  
 And what about human? Where is their sooth?  
 They can't fly up and leave this Earth  
 But they have wings that give them birth.  
 They don't have wings from feathers  
 They made of **honor, sooth and trust**.  
 Some of them of **total dedication**  
 Other **of everlasting aspiration**,  
 Someone swears to do the best  
 Other care about the nearest,  
 Somebody has wings of **hope and dreams**  
 And other of **songs and rhymes**.  
 They can't fly up and live in **clouds** (Khudozhnie slovo, 2020: 19).

In the translation made by a 3<sup>rd</sup> prize-winner we can observe interesting tendencies and lyrical creative approach in translating of main conceptual elements of the original poem. The student applied two lexemes representing the shades of one phenomenon – *sky* and *heights*, not *heaven*. Also she had used the concept of *clouds* allegedly making allusion with “*head in clouds*”, a dreamer. *The wingy people* in her translation has correlation with J. Weir’s “*winged people*”. So, people who can’t have wings physically can fly on the winds of fantasy and spirit. This notable for translation of the student and of professional translator J. Weir.

Interesting observation – in her “*bird's truth*” she describes the ability of the bird to fly and even not think about this, it is an inborn ability comparing to a human who had only wings of *poetry or freedom or love*. The student also keeps in her translation such basic element of a verse as *honor, trust, dedication, hope dreams*. The impression of a reader may be very spiritual, she could transfer this desire or physically wingless people to fly on the *wings of songs and rhymes*. This is very valuable. Comparing to transition of John Weir, this variant seems more poetic and not so close to the original, but full of high senses and emotions.

## 6. Conclusions

Let's summarize the main elements of conceptual analysis's interpretation of the verse “*Wings*” by Lina Kostenko. In the original poem main conceptual elements of the verse were the following: *truth, virtue, trust, devotion in love, freedom*. In the interpretation of J. Weir we can underline the following components: *truth, heaven, honor, poetry, dream*.

In the poetic interpretation of the poem by the prize-winners of Translator's Competition the elements were distributed in such a way: first prize-winner had used *sky, evergreen love, empathy, family-get-together wings of love*. She broadened the sense of a poem comparing to the original and translation of J. Weir and gave new fresh interpretation for English-speaking reader.

The second prize-winner suggested such conceptual elements as *sky, heights, truth, clarity, love, devotion, lack of double-dealing; labor is glorious* (interesting fresh interpretation); *wings...made of charity*. This interpretation gives new conceptual depth into poem's inner senses with strong romantic connotation. The third prize-winner in her poetic work concentrated on such concepts as *honor, trust, dedication, hope, dream, wings of songs and rhymes*. This variant has shown more poetic approach and will offer new thoughts and inspirations for English-speaking readers. Lina Kostenko's poetry is always modern and full of ideas that represent Ukrainian worldview and character to the people of other countries, English-speaking

in particular. The investigation has shown huge potential for further analysis and scientific elaboration.

### References

1. *Brytanska perekladachka z ukrainskoyu dusheyu* (2025). [*The British translator with Ukrainian soul*]. Retrieved April 13, 2025 from: <https://lvivski.info/uk/eternal-6042-brytanska-perekladachka-z-ukrayinskoyu-dusheyu-unikalna-istoriya-viry-rich> [in Ukrainian]
2. Paul R. Carlile (2003, December 14). *Transferring, Translating and Transforming*. Boston University. [https://www.researchgate.net/publication/37595260\\_Transferring\\_Translating\\_and\\_Transforming\\_An\\_Integrative\\_Framework](https://www.researchgate.net/publication/37595260_Transferring_Translating_and_Transforming_An_Integrative_Framework).
3. Lina Kostenko. Kryla. *Biblioteka ukrainskoyii literatury* (2025). [*Lina Kostenko. Wings. Ukrainian Literature Library*]. Retrieved April 13, 2025 from: <https://www.ukrlib.com.ua/books/printit.php?tid=5766> [in Ukrainian]
4. *Khudozhnie slovo v svitovii kulturi: XIV Vseukrainskii konkurs perekladu*. (2020). [*The Word of Art in the World Culture: All-Ukraine Translation Competition*]. Severodonetsk: Volodymyr Dahl Publisher. [in Ukrainian]
5. Weir, John. *Encyclopedia of Ukraine* (2025). Retrieved April 13, 2025 from: <https://www.encyclopediaofukraine.com/display.asp?linkpath=pages%5CW%5CE%5CWeir-John.htm>

## CONCEPTUAL APPROACHES TO HARD AND SOFT SKILLS AS THE FOUNDATION OF PROFESSIONAL-ETHICAL CULTURE OF SPECIALISTS IN HEALTHCARE SERVICES

**Yuliia Yevtushenko**

Candidate of Pedagogical Sciences, Associate Professor,  
Associate Professor at the Department of Microbiology, Virology, Immunology,  
Medical Physics and Medical Informatics,  
State Establishment "Lugansk State Medical University", Ukraine  
e-mail: julia.evtyshenko@ukr.net, orcid.org/0000-0002-7315-3337

### Summary

Modern medical education requires specialists who combine high technical competence (Hard Skills) with developed ethical and communication skills (Soft Skills). The relevance of the research is due to growing demands for ethical behaviour among medical personnel in conditions of digitalisation, personalised medicine, and increased patient awareness. A gap is often observed between technical knowledge and insufficiently developed Soft Skills, complicating effective interaction with patients and colleagues. The novelty lies in substantiating an integrated author's model for forming Hard and Soft Skills based on principles of interdisciplinarity, ethical orientation, technological adaptability, and comprehensive assessment, considering international experience (Harvard Medical School, Karolinska Institute, NUS). The article analyses four conceptual approaches (integrative, competency-oriented, ethics-oriented, technological), identifies key components of Hard and Soft Skills, and challenges of their implementation. Research methods included theoretical analysis of scientific literature, systematisation and classification, comparative study of international experience, synthesis, and generalisation of the obtained data. Practical recommendations are proposed for Ukrainian medical universities regarding curriculum updates, faculty training, implementation of digital platforms, and collaboration with clinical bases. The research results will improve the quality of medical education and strengthen trust in the medical profession.

**Key words:** Hard Skills, Soft Skills, professional-ethical culture, medical education, integrative approach, competency-oriented approach.

DOI <https://doi.org/10.23856/6910>

### 1. Introduction

"A doctor may wield a scalpel masterfully, but if his heart is closed to compassion, his hand loses its true healing power." This old medical wisdom emphasises that professionalism in medicine encompasses not only technical skills but also a deeply humane attitude toward the patient. Without empathy, understanding, and compassion, even the best medical manipulations may lose their effectiveness, as treatment is not merely a physical process but also support for the soul.

In conditions of rapid scientific and technological progress, where artificial intelligence technologies, telemedicine, and robotic surgery are becoming commonplace, the significance of the human factor (empathy, ethical consciousness, and the physician's communicative capacity) is growing. Research confirms that for patients, a physician's ability to communicate effectively



and demonstrate empathy are criteria of medical care quality no less important than technical skills (Arshad et al., 2024; Mag. David Riedl, 2017; Mainul Haque, 2019). A physician's empathy directly affects patients' trust, treatment satisfaction, therapy adherence, and objective clinical outcomes.

Medical education today faces serious challenges. The rapid development of medical technologies requires future doctors to learn and adapt to new diagnostic and treatment methods continuously. Simultaneously, society's growing expectations regarding the quality and accessibility of medical care and increased patient awareness necessitate the formation of medical education graduates of not only deep professional knowledge but also developed communication skills, capacity for collaboration, and ethical responsibility.

Therefore, the need to rethink approaches to professional training of medical specialists comes to the forefront. Integrating Hard Skills (professional knowledge and clinical abilities) and Soft Skills (communicative, ethical, and socio-emotional competencies) should be considered a key condition for forming a professional-ethical culture. This culture serves as the foundation of trust, effective team interaction, and ensuring high standards of medical practice.

**Purpose** – to substantiate conceptual approaches to the formation of Hard and Soft Skills as the foundation of the professional-ethical culture of future specialists in healthcare services, considering the international experience and contemporary challenges in medical education.

**Research objectives:**

- Analyse the theoretical foundations for forming Hard and Soft Skills in professional training for healthcare service specialists.
- Identify key components of Hard Skills that determine medical practice's quality, safety, and effectiveness.
- Conduct a comparative analysis of hard and soft skills in the context of their significance in the ethical behaviour of medical professionals.
- Evaluate Soft Skills' impact on forming a professional-ethical culture of future medical specialists.
- Outline current challenges in implementing Soft Skills in the educational process of physician training.
- Examine conceptual approaches to improving the professional training of medical personnel and identify their key differences.
- Analyse international experience in Hard and Soft Skills formation in medical education and, based on it, propose an author's model for their integration.
- To develop practical recommendations for medical universities in Ukraine regarding effectively implementing an integrated approach to forming a professional-ethical culture through developing Hard and Soft Skills.

## 2. Main part

**Analysis of current research.** In the context of medical education transformation, researchers are increasingly focusing on integrating professional (Hard Skills) and socio-communicative (Soft Skills) competencies to train future physicians. A growing number of scientific studies indicates the relevance of developing comprehensive educational models that harmoniously combine technical knowledge with the ethical component of professional culture. Analysis of scientific literature demonstrates a tendency to rethink the relationship between technical and social competencies in professional training. Researchers unanimously recognise that a physician's professional-ethical culture forms at the intersection of Hard and Soft

Skills. Ivanenko and Gordiychuk emphasise the synergy of professional knowledge (such as clinical diagnostics) and emotional stability, responsibility, and reflection (*Ivanenko & Hardiichuk, 2021*). Ryadnova and co-authors clarify that Soft Skills, such as empathy and communication, transform technical competence into ethically balanced practice (*Riadnova et al., 2021*). An international study by Paechter et al. confirms that without social competencies, technical skills lose effectiveness in clinical situations where patient interaction is key (*Paechter et al., 2023*). These sources emphasise that Hard Skills ensure procedural accuracy, while Soft Skills create a bridge to ethical behaviour, forming a holistic professional identity. However, the lack of clear criteria for evaluating integrated competencies remains challenging for educators.

Kolyada and Kravchenko suggest practising technical skills in the context of ethical dilemmas, for example, through role-playing games that develop communication (*Koliada & Kravchenko, 2020*). Chukhno emphasises gaming technologies where simulations combine diagnostics (Hard Skills) with ethical decision-making (Soft Skills) (*Chukhno, 2021*). Borovyk and co-authors emphasise the need to integrate Soft Skills into clinical disciplines so that communication and critical thinking develop in parallel with technical abilities (*Borovyk et al., 2021*). These approaches demonstrate the advantages of active learning that engages students in solving complex tasks. However, methodologies often remain localised, without standardisation for broader implementation.

The latest studies propose new conceptual models for skills integration. Lukash, Gryshyna, and Buryak developed the concept of a "Physician's Self-Brand" that combines technical excellence with ethical self-positioning, forming a unique professional identity (*Lukash et al., 2024*). Kushnir, Kaminska, and Starchenko consider linguistic competence as a tool for precise expression (Hard Skills) and ethical communication (Soft Skills) (*Kushnir et al., 2023*). Myroshnychenko and co-authors emphasise the role of emotional intelligence in transforming technical skills into ethical practice (*Myroshnichenko et al., 2023*). These concepts reflect a transition from a dichotomous perception of Hard and Soft Skills to their organic unity. They also indicate the need for interdisciplinary approaches that engage educators, psychologists, and practitioners in curriculum development.

Literature analysis shows that Ukrainian and international research is gradually shifting toward understanding Hard and Soft Skills as interpenetrating components. However, gaps remain:

- competency assessment (standardised tools for evaluating integrated skills, especially Soft Skills, are lacking);
- methodological framework (methodologies that ensure simultaneous development of technical and ethical competencies are insufficiently developed);
- cultural adaptation (studies rarely consider regional specificities, limiting their applicability).

Despite significant theoretical research and practical developments, the problem of balanced formation of hard and soft skills as the foundation of the professional-ethical culture of medical specialists remains unresolved. Clear criteria for evaluating integrated competencies are absent, and methodologies ensuring the simultaneous development of technical and ethical skills are insufficiently developed, necessitating further scientific inquiry and experimental research.

**Results and discussion.** We must examine the theoretical foundations of this process to gain a profound understanding of shaping professional-ethical culture in future healthcare specialists through the lens of hard and soft skills development.

The evolution of medical education reflects changing perceptions of a physician's key competencies. Traditionally, the primary focus was mastering fundamental medical knowledge and clinical skills that constitute the core of Hard Skills. The training of future doctors predominantly followed a "teacher-student" model, where practical experience was transmitted through direct observation and participation in the treatment process (*Santanu Bhattacharya, 2023*).

However, with the advancement of medical science, increasing technological complexity, and the growing role of patient-centred approaches, awareness of the importance of so-called "soft" skills gradually increased. References to the necessity of compassion, attention to patients, and practical communication abilities can be found in the works of prominent physicians of the past (*Litvak, 2019*). Nevertheless, systematic study and implementation of Soft Skills in medical education became more active in the second half of the 20th century, driven by a growing understanding of psychosocial aspects of health and illness and the need for more effective interaction between healthcare professionals and patients.

Today, we observe a further evolution of approaches where Hard and Soft Skills are viewed not as separate components but as interconnected elements of a physician's professional competence, necessary for providing quality and ethical medical care in contemporary challenges.

In the following analysis, let's clarify the understanding of key terms in the medical context to ensure clarity and unambiguity.

Hard Skills in the healthcare field are defined as specific technical knowledge, abilities, and practical skills necessary for performing professional duties (*Malanchuk et al., 2023 : 52*). They include knowledge of fundamental medical disciplines (anatomy, physiology, pharmacology, etc.), ability to conduct diagnostic procedures, interpret examination results, perform therapeutic manipulations, master surgical techniques, and more. These skills are objectively measurable and formalised: they can be taught and verified through examinations, certifications, and practical assessments. Hard Skills are typically acquired through educational programs, training, and practical experience and form the foundation for a physician's professional activity.

Soft Skills in the medical context encompass a complex of personal qualities social, communicative, and emotional competencies that affect the effectiveness of healthcare worker interactions with patients, colleagues, and other medical personnel (*Malanchuk et al., 2023 : 53*). Key Soft Skills in medicine include: effective communication (verbal and non-verbal), empathy, listening skills and active information perception, interpersonal interaction skills, teamwork abilities, leadership qualities, critical thinking, emotional intelligence, stress resistance, conflict resolution capacity, and others. These skills are more subjective in assessment but are crucial for ensuring a quality and human-centred approach in medicine.

The professional-ethical culture of medical specialists represents an integrated system of values, norms, behavioural rules, and professional standards that define the moral and ethical foundations of their activities, attitudes toward patients, colleagues, society, and their profession. It results from acquiring professional knowledge, developing relevant skills, and forming personal qualities.

The main components of the professional and ethical culture of a healthcare professional are:

- ethical knowledge (principles of autonomy, beneficence, harmlessness, justice, knowledge of medical legislation and codes of ethics);
- moral qualities (honesty, responsibility, humanity, compassion, respect for the dignity and rights of the patient);
- communication competence (effective interaction with patients, emotional support);

- professional responsibility (awareness of the consequences of professional actions, striving for self-development);
- team interaction (respect for colleagues, participation in joint decision-making);
- emotional intelligence (ability to understand own emotions and emotions of others, manage them and use this information for effective interaction).

The harmonious combination of Hard and Soft Skills is essential for a physician's successful professional practice. Technical knowledge without ethical grounding may lead to improper application of knowledge. Communication skills (such as active listening and clear diagnosis explanations) provide diagnostic accuracy, psychological support, and patient trust. Empathy, a cornerstone of effective communication, fosters emotional connection and treatment adherence. Without it, even highly skilled professionals may fail to achieve therapeutic outcomes. However, humanistic values alone cannot replace clinical competence. Mastering Hard Skills remains a critical component of medical training, directly impacting patient safety, precision, and intervention efficacy. These skills enable the practical application of knowledge and ensure seamless interaction with modern healthcare technologies.

Key components of Hard Skills in medical practice include:

- diagnostic skills (gathering medical history, conducting physical examinations, interpreting the results of laboratory and instrumental tests (X-ray, ultrasound, CT, MRI, ECG), making a clinical diagnosis);
- skills in using medical technologies (proficiency in modern medical equipment and digital tools for maintaining electronic records, monitoring patients' conditions, and making clinical decisions);
- clinical procedural skills (performing basic and specialised manipulations (injections, catheterisations, punctures, surgical interventions)).

These skills are formed throughout the entire period of study and professional development through theoretical courses, practical classes, simulation, and clinical training under the guidance of mentors.

New challenges in the professional training of future doctors require the expansion of the concept of Hard Skills:

- artificial intelligence (image analysis, risk prediction, decision support; the doctor must be able to interpret data obtained using AI critically);
- telemedicine (using digital platforms, protecting personal data, remote communication);
- robotic surgery and other high-tech treatment methods (mastering the control of complex technical systems and understanding the operating algorithms of equipment).

Modern Hard Skills combine traditional clinical competencies with digital literacy, flexibility of thinking, and technological adaptability, which allows for the effective integration of innovations into medical practice.

A doctor's success is determined not only by their technical proficiency but also by their ability to communicate effectively. Soft Skills are the foundation that ensures trust, collaboration, respect, and psychological safety in medical interactions.

In the context of the medical profession, the following soft skills are of particular importance:

- communication (verbal and non-verbal, active listening, clear explanation of diagnosis and treatment, emotional support);
- empathy (the ability to understand patients' experiences, showing care, reducing anxiety);

- leadership (responsibility for decisions made, coordination of teamwork, motivation of colleagues);
- conflict resolution (preventing escalation, finding compromises, and maintaining a positive work environment);
- adaptability (readiness for change, learning new things, flexibility in treatment methods).

Soft Skills are particularly important for building trust between a doctor and a patient. They ensure clear and accessible communication, demonstrate understanding and support, respect the patient's dignity, beliefs, and choices, and adhere to professional ethics and confidentiality.

Therefore, Soft Skills affect the quality of interaction and are also an essential component of a doctor's professional and ethical culture. They enable the realisation of the key ethical principles of modern medicine.

A doctor's professional and ethical culture is formed by implementing ethical principles in daily practice. For example, realising the principle of respect for patient autonomy requires knowledge of medical standards (Hard Skill) and the ability to convey complex information in an accessible, respectful, and emotionally sensitive manner (Soft Skill). Ethical behaviour also implies responsibility for one's actions and a willingness to admit mistakes, which is a manifestation of the professional and communicative maturity of the specialist.

The formation of a medical professional's professional and ethical culture is closely linked to the development of technical and interpersonal skills. Insufficient professional competence can lead to errors that contradict the principle of "no harm." At the same time, Soft Skills are necessary to implement ethical norms and standards in interactions with patients and colleagues.

For clarity, a comparative analysis of Hard and Soft Skills is presented in the context of their impact on the professional and ethical culture of a doctor (Tab. 1).

Table 1.

**Comparison of Hard and Soft Skills in the context of medical practice**

Type of skills	Examples	Impact on professional and ethical culture
Hard Skills	Knowledge of clinical treatment protocols.	Promotes informed and safe decisions for the patient ("no harm" principle).
	Knowledge of medical legislation and ethical codes.	Promotes patient rights, medical secrecy, and legal responsibility.
	Ability to conduct clinical diagnostics.	Ensures treatment accuracy and prevents errors that may have ethical consequences.
	Skills in using medical equipment.	Ensures safe procedures, respect for the physical integrity of the patient.
Soft Skills	Empathic communication with the patient.	It forms trust, provides psychological comfort, and enhances respect for the patient's dignity.
	Active listening.	It allows you to understand the patient's needs more accurately and helps avoid conflicts.
	Team interaction with colleagues.	Supports professional ethics and forms a favourable environment in the team.
	Stress resistance and emotional self-control	Guarantees the preservation of ethical behaviour in crisis conditions.
	Ability to reflect.	Promotes self-improvement, understanding of mistakes, and ethical growth.

Hard Skills provide the professional competence necessary for making ethically sound clinical decisions. At the same time, Soft Skills act as a mechanism for implementing ethical principles in daily practice, promoting a humane, fair, and responsible attitude towards patients and colleagues. Only the holistic development of both skills allows future doctors to develop a highly professional and ethical culture. Thus, combining Hard Skills and Soft Skills creates the foundation for a doctor's professional and moral maturity.

This integrated approach is becoming particularly relevant in the context of modern challenges. Traditionally, doctor training has emphasised fundamental scientific knowledge and clinical skills (Hard Skills). However, the contemporary paradigm is changing: increasing attention is paid to forming Soft Skills, ethical guidelines, and communicative competence. These changes are driven not only by internal processes in education development but also by some global challenges: pandemics, an ageing population, and the emotional burden on health-care professionals.

Modern society expects not only professional mastery from a doctor but also humanity, accessibility in communication, and the ability to engage in partnership with the patient. Patients value effective treatment and attention to them as individuals, emotional support, and participation in making decisions about their health.

Despite the awareness of the importance of Soft Skills, their implementation in educational programs is accompanied by some difficulties:

- overloading of curricula (an excessive number of subjects and limited time make it impossible to pay sufficient attention to the development of interpersonal skills);
- lack of teacher training (often, educators do not have the relevant experience or methodologies for developing Soft Skills in students);
- complexity of assessment (formalised assessment of the level of Soft Skills development requires special approaches and criteria that have not yet become generally accepted);
- underestimation by educational institutions (in some cases, Soft Skills are considered secondary compared to Hard Skills, which reduces their priority in training programs).

Given these difficulties, the question arises about optimal mechanisms for overcoming them. In this context, modern pedagogical science offers some conceptual approaches to improving the professional training of medical professionals, among which four main ones deserve special attention: integrative, competency-based, ethics-oriented, and technological. Each has its advantages, limitations, and implementation logic, but they are all aimed at ensuring the holistic development of Hard and Soft Skills.

The integrative approach is characterised by a systematic combination of technical and social skills within a single learning activity. For example, during the analysis of a clinical case, students not only analyse medical data (Hard Skills) but also master communication skills, ethical dilemma resolution, and teamwork (Soft Skills). In contrast, the competency-based approach focuses not on the form of material presentation but on the result (specific competencies that should be formed in the graduate according to professional standards). Soft Skills are considered an integral part of the competency model, and their development is subject to evaluation on par with technical skills.

Unlike the previous two, the ethics-oriented approach emphasises forming the future doctor's moral foundation. The focus is on studying bioethics, medical law, ethical dilemmas, and developing Soft Skills such as empathy, reflection, and respect for patient dignity. Technical training in this approach plays a supporting role. In turn, the technological approach proposes the integration of Hard and Soft Skills through educational innovations: simulations, virtual



patients, online courses, and interactive platforms. This allows for a safe and flexible learning environment where future doctors can train in conditions close to reality.

For a clear comparison of the considered approaches, we offer the following table (Table 2).

Table 2.

**Comparative analysis of conceptual approaches to the formation of Hard and Soft Skills**

<b>Criterion</b>	<b>Integrative approach</b>	<b>Competence-oriented approach</b>	<b>Ethical-oriented approach</b>	<b>Technological approach</b>
Essence	Combination of Hard and Soft Skills within disciplines.	Formation of complex professional competencies.	Priority of moral and ethical values and Soft Skills.	Integration of skills through digital technologies.
Efficiency	High	High	High	High
Availability	Depends on the training of teachers.	Requires software and methodology updates.	Sufficiently high, provided qualified tutors are available	Limited due to infrastructure requirements.
Scalability	The difficulty is due to the need for changes in methodologies.	Possible with regulatory support.	Relatively easy to implement.	High after initial investment.

The key differences between the approaches lie in the following:

- learning objectives (skill integration during the process, achievement of results in the form of developed competencies, and the cultivation of value orientations);
- tools (scenarios, competency modules, case studies, digital solutions);
- resource needs (technical equipment, methodological framework, teacher training)

The value lies not in choosing one approach but in their combination. Integrativity, technological advancement, ethical focus, and effectiveness are complementary vectors of educational transformation that meet the requirements of modern medicine. This systemic interaction of approaches forms a new paradigm of medical education that meets the demands of a globalised world.

In the modern international educational space, medical professionals' professional training is increasingly focused not only on the development of technical skills but also on interpersonal, ethical, and cultural competencies. Leading medical schools worldwide are implementing innovative educational approaches that ensure the holistic development of hard and soft skills in future doctors based on patient-centred medicine requirements, digital technologies, and the intercultural context.

The most common educational strategies include simulation training, case methods, interdisciplinary modules, elements of reflective practice, and clinical situation modelling. These methods simultaneously promote the development of clinical thinking, emotional intelligence, ethical responsibility, and technical competence. In parallel, using digital technologies and evidence-based learning allows for improving the quality of the educational process and preparing a specialist capable of adapting to a rapidly changing medical environment.

Let's consider examples of successful educational practices in leading universities worldwide that demonstrate models of Hard and Soft Skills integration (Table 3).

Table 3.

Cases of the world's leading universities

University	Country/Region	Hard/Soft Skills Integration Techniques
Harvard Medical School	USA	Pathways-tracks: teamwork, simulations, medical ethics, weekly interactive sessions with practitioners.
Karolinska Institute	Sweden	Bioethics, role-playing, reflective practice in the clinical environment.
National University of Singapore (NUS)	Singapore	Telemedicine, digital literacy, medical leadership, cultural sensitivity.
Imperial College London	United Kingdom	Clinical cases, communication skills, conflict resolution, technology innovation.
Kyoto University School of Medicine	Japan	Combining traditional ethics, teamwork and simulation technologies.

In analysing university case studies, it is essential to consider the regional specifics of implementing educational strategies. Educational models in the USA, Europe, and Asia differ in cultural emphasis, teaching and assessment approaches, the level of technological support, and the philosophy of interaction between doctor and patient (Table 4).

Table 4.

Comparison of regional approaches: USA, Europe, Asia

Criterion	USA	Europe	Asia
Orientation	Individualism, leadership development, physician autonomy.	Collectivism, emphasis on social responsibility, ethical cohesion.	Harmony, hierarchy, cultural sensitivity.
Methodology	Competence-Based Learning (CBME), simulations.	Bioethical approach and involvement in clinical cases from the first courses.	Focus on traditional values, discipline, and interprofessional integration.
Evaluation	Objective structured clinical examinations (OSCE), clinical scenarios, and reflective essays.	Portfolio, qualitative evaluation, self-observation	Observation in action, group assessment, feedback culture.
Technology	Focus on digital platforms and data analytics.	Balance between traditional methods and innovation.	High-tech training with adaptation to the local context.

Summarising the international experience, it is advisable to emphasise the advantages of a hybrid approach to the Ukrainian medical education system. Adapting combined models that include evidence-based medicine, simulation technologies, interdisciplinary training, and ethics-oriented preparation is optimal. This approach will contribute to the profession and the moral readiness of future doctors for the challenges of the modern medical environment.

Based on the analysis of international experience and a comparative study of conceptual approaches, an author's model for integrating Hard and Soft Skills in the professional training of future doctors is proposed. The model meets the modern challenges of medical education, combining clinical competence with emotional maturity, ethical thinking, teamwork skills, and digital literacy (Fig. 1):

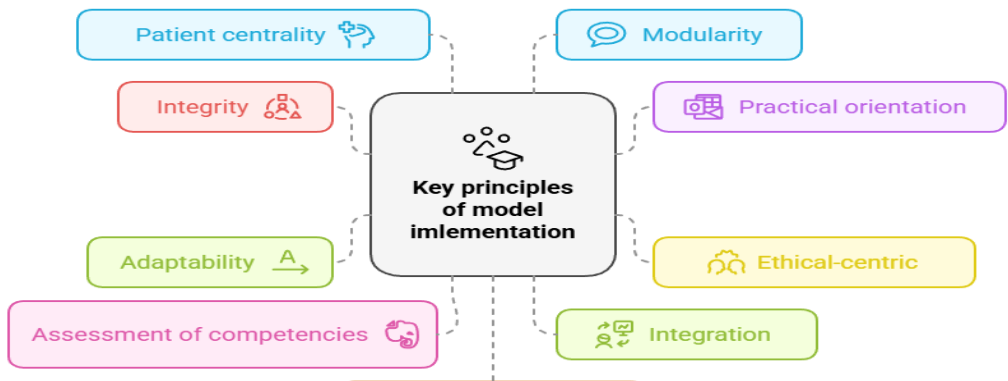


Figure 1. Visualise model components and their relationships.

This system posits that Hard and Soft Skills do not exist in isolation but instead form a holistic professional competence through integrative learning methods: simulation training, PBL (Problem-Based Learning), and clinical immersion. Each component plays a unique role, but their balance shapes a doctor's professional and ethical culture.

Key principles for the implementation of the model (Fig. 2).

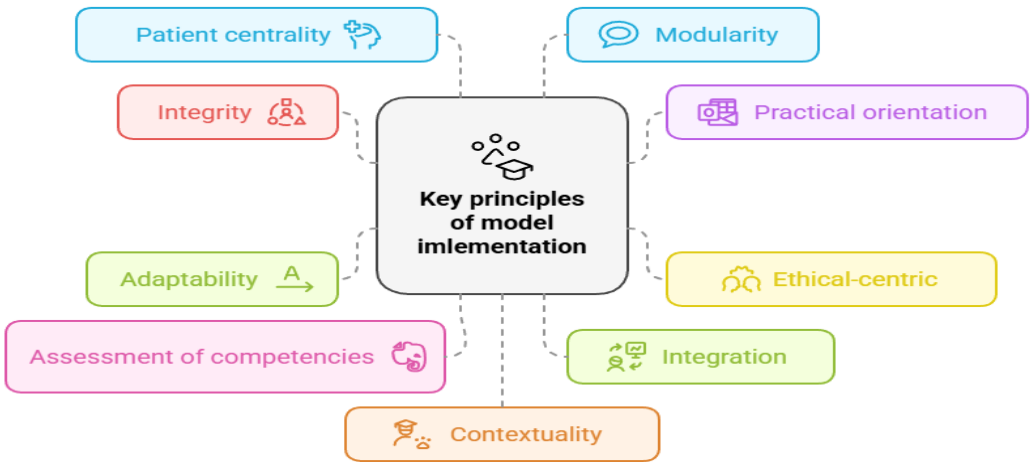


Figure 2. Key principles of implementing the model of formation of professional and ethical culture of the future doctor.

These principles are based on international experience, particularly the programs at Harvard Medical School and Karolinska Institute, which demonstrate the success of integrative approaches. (Harden, 2018).

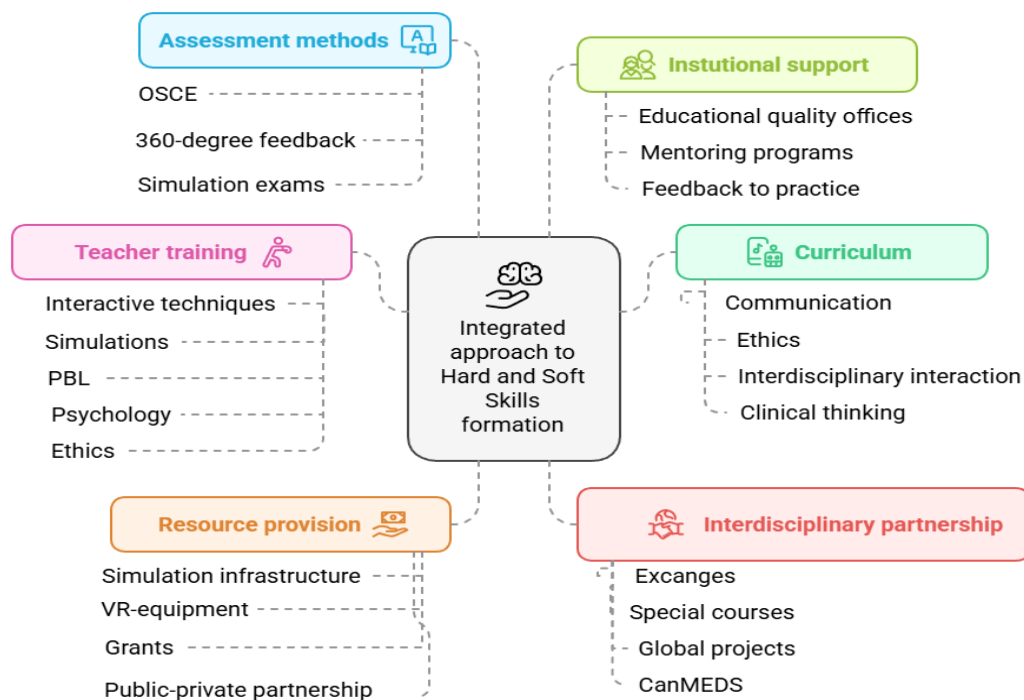
For the effective implementation of the proposed model, the following conditions are necessary:

- infrastructure (simulation centres, VR technologies, digital platforms);
- educational and methodological support (updating programs, interdisciplinary courses);

- teacher training (development of pedagogical and Soft Skills among the teaching staff);
- funding (state support, grant programs, investments);
- international cooperation (partnerships with universities (Harvard, NUS, etc.));
- cultural adaptation (consideration of local ethical/sociocultural specificities);
- assessment system (comprehensive evaluation of professional and ethical competencies (OSCE, portfolio, behaviour in simulations));
- educational environment (open, supportive, communicative);
- stakeholders (involvement of clinical bases, employers, patient communities);
- administrative support (strategic vision and regulatory framework from higher education institutions);
- feedback (monitoring practice needs, feedback from graduates and medical institutions).

The proposed model is adaptive and can be effectively integrated into the educational space of Ukrainian medical universities, considering their resources, regional context, and strategic priorities. Its implementation will contribute to the formation of a new generation of medical professionals – not only technically competent but also deeply ethical, communicative, psychologically mature, and ready for the challenges of modern medicine.

Taking into account the outlined conceptual model and international experience, specific recommendations are provided below that can be used by medical universities in Ukraine for the effective implementation of an integrated approach to the formation of Hard and Soft Skills (Fig. 3).



**Figure 3. Practical recommendations for medical universities in Ukraine.**

These steps aim to overcome key challenges in medical education, such as the overload of curricula, lack of teacher training, and the complexity of assessing Soft Skills. They ensure the holistic integration of technical, communicative, and ethical competencies, shaping a new generation of medical professionals capable of meeting modern societal demands. Implementing these recommendations, including updating curricula, introducing simulation technologies, and validating assessment methods, will improve the quality of doctor training and strengthen trust in the medical profession in Ukraine. Medical universities, clinical bases, and international partners must join forces to implement these changes, ensuring education transformation by global standards and local needs.

### 3. Conclusion

Modern medical education requires a holistic approach to training specialists who combine technical mastery with developed communicative and ethical competencies. Theoretical analysis confirms that Hard Skills (diagnostic, procedural, technological skills) ensure the safety and effectiveness of medical practice. At the same time, Soft Skills (empathy, communication, emotional intelligence) form the basis of professional and ethical culture, fostering trust, compliance, and teamwork. A comparative analysis of these skills showed their complementarity: Hard Skills guarantee evidence-based clinical decisions, while Soft Skills ensure their ethical implementation.

The research identified key challenges in implementing Soft Skills, including the overload of curricula, lack of teacher training, the complexity of assessment, and underestimating their role. To overcome these, four conceptual approaches were analysed: integrative (combining skills in learning activities), competency-based (focus on standardised competencies), ethics-oriented (emphasis on moral values), and technological (using simulations, VR, AI). Their combination, as demonstrated by the international experience of leading universities (Harvard, Karolinska, NUS), ensures the synergy of technical and ethical competencies through simulation training, problem-based learning (PBL), and early clinical immersion.

The proposed author's model for integrating Hard and Soft Skills is based on interdisciplinarity, ethical orientation, and technological adaptability principles. It uses simulation methods, ethical case studies, and comprehensive assessment (OSCE, portfolio) to form a professional and moral culture. For its implementation in Ukrainian medical universities, it is recommended that curricula be updated, teacher training in soft skills development methodologies be introduced, validated assessment tools be implemented, and clinical bases and international partners be involved.

Thus, the balanced development of Hard and Soft Skills is a response to modern medical challenges, such as digitalisation and society's growing expectations, and a foundation for training doctors capable of combining professional competence with humanity and ethical responsibility. Implementing the proposed approaches and model will contribute to transforming medical education in Ukraine, ensuring high-quality standards and trust in the medical profession.

The prospects for further research will focus on analysing the impact of integrative educational programs on clinical outcomes, patient satisfaction, and professional burnout of healthcare workers 5–10 years after graduation.

## References

1. Arshad, M, Sriram, S, Khan, S, Gollapalli, PK, & Albadrani, M. (2024). Mediating role of physician's empathy between physician's communication and patient's satisfaction. *J Family Med Prim Care*, 13(4), 1530-1534 [in English].
2. Borovyk, K.M., Ryndina, N.H., Shaparenko, O.V., Yermak, O.S., Ivashchenko, R.O., & Romaniuk, M.H. (2021). Formuvannia soft skills v osvithnomu protsesi vyshchoi medychnoi shkoly [Formation of soft skills in the educational process of higher medical school]. *Aktualni pytannia lnhvistyky, profesiinoi lnhvodydaktyky, psykhologii i pedahohiky vyshchoi shkoly – Actual issues of linguistics, professional linguodidactics, psychology and pedagogy of higher education: Proceedings of the VI International Scientific and Practical Conference*, (pp. 36-39). Poltava: PDMU [in Ukraine].
3. Chukhno, I.A. (2021). Teoretychne obhruntuvannia dydaktychnykh umov formuvannia soft skills u studentiv medychnoho ZVO zasobamy ihrovykh tekhnologii [Theoretical substantiation of didactic conditions for the formation of soft skills in medical students by means of game technologies]. *International scientific innovations in human life. Proceedings of the 1st International scientific and practical conference*, (pp. 426-435). Manchester: Cognum Publishing House [in Ukraine].
4. Harden, R.M. (2018). Ten key features of the future medical school. *Medical Education*, 52(10), 998-1002 [in English].
5. Ivanenko, I.V., & Hordiichuk, S.V. (2021). Formuvannia zahalnykh kompetentnostei u zdobuvachiv medychnoi osvity [Formation of general competences in medical education students]. *Pedahohichni nauky: teoriia i praktyka – Pedagogical sciences: theory and practice*, 3, 154-159 [in Ukraine].
6. Koliada N., & Kravchenko O. (2020). Praktychnyi dosvid formuvannia «soft-skills» v umovakh zakladu vyshchoi osvity [Practical experience of forming 'soft-skills' in the conditions of a higher education institution]. *Aktualni pytannia humanitarnykh nauk – Actual issues of the humanities*, 3(27), 137-145 [in Ukraine].
7. Kushnir, V., Kaminska, I., & Starchenko, M. (2023). Lnhvistychna kompetentnist–zaporuka rozvytku «Soft skills» maibutnikh medykyv [Linguistic competence as a key to the development of soft skills of future doctors]. *Visnyk pisliadyplomnoi osvity: zbirnyk naukovykh prats. Seriia «Pedahohichni nauky» – Bulletin of postgraduate education: a collection of scientific papers. Series 'Pedagogical Sciences'*, 24(53), 88-100 [in Ukraine].
8. Lukash, Yu.M., Hryshyna, O.S., & Buriak, N.V. (2024). Innovatsiini pidkhody do formuvannia soft skills u medychnii osviti: osvithnii komponent «Ia-brend likaria» [Innovative approaches to the formation of soft skills in medical education: the educational component 'I-brand of a doctor']. *Pedahohichna Akademiia: naukovi zapysky – Pedagogical Academy: scientific notes*, (7), 103-125 [in Ukraine].
9. Litvak, A. (2019). Rozvytok etychnoi dumky v medytsyni. *Novyny medytsyny ta farmatsii* [Development of ethical thought in medicine]. *Novyny medytsyny ta farmatsii – News of medicine and pharmacy*, 11(698). Retrieved from <http://hypertension.mif-ua.com/archive/article/48278> [in Ukraine].
10. Mainul Haque. (2019). Importance of Empathy Among Medical Doctors to Ensure High-Quality Healthcare Level. *Advances in Human Biology*, 9(2), 104-107 [in English].
11. Mag. David Riedl. (2017). The Influence of Doctor-Patient Communication on Health Outcomes: A Systematic Review. *Psychosomatische Medizin und Psychotherapie*, 63, 131-150 [in English].



12. Malanchuk, L.M., Martyniuk, V.M., Malanchuk, S.L., Franchuk, U.Ya., & Franchuk, M.O. (2023). *Cuchasnyi pohliad stratehii rozvytku vyshchoi medychnoi osvity kriz pryzmu "Hard i Soft Skills"* [A modern view of the strategy for the development of higher medical education through the prism of "Hard and Soft Skills"]. *Medychna osvita – Medical Education*, 2, 51-56 [in Ukraine].
13. Myroshnychenko, M.S., Safarhalina-Kornilova, N.A., Bibichenko, V.O., & Kucheriavchenko, M.O. (2023). *Emotsiinyi intelekt yak skladova soft skills ta yoho znachymist dlia pidgotovky vysokokvalifikovanykh medychnykh kadriv* [Emotional intelligence as a component of soft skills and its importance for the training of highly qualified medical personnel]. *Aktualni pytannia pedahohiky vyshchoi medychnoi osvity – Actual issues of pedagogy of higher medical education: Proceedings of the All-Ukrainian scientific and practical conference with international participation*, (pp. 185-187). Kharkiv: KhNMU [in Ukraine].
14. Paechter, M.P., Scott, D., Soler, J., & Knowledge, P. (2023). *Pol soft skills u protsesi formuvannia profesiinykh navychok maibutnikh likariv* [The role of soft skills in the process of forming professional skills of future doctors]. *Visnyk humanitarnoho naukovoho tovarystva: naukovi pratsi – Bulletin of the Humanities Research Society: scientific papers*, 23, 182-187 [in Ukraine].
15. Riadnova, V.V., Bezeha, N.M., Bezkorovaina, I.M., Pera-Vasylchenko, A.V., Steblovska, I.S., & Voskresenska, L.K. (2021). *Formuvannia y rozvytok «Soft skills» u studentiv medychnykh zakladiv vyshchoi osvity yak vazhlyva skladova yikh uspishnoi samorealizatsii* [Formation and development of soft skills in medical students of higher education institutions as an important component of their successful self-realisation]. *Realii, problemy ta perspektyvy vyshchoi medychnoi osvity – Realities, problems and prospects of higher medical education: Proceedings of the Educational and Scientific Conference with International Participation*, (pp. 223-224). Poltava: UMDA [in Ukraine].
16. Santanu Bhattacharya. (2023). *Competency-based medical education: An overview*. *Annals of Medical Science and Research*, 2(3), 132-138 [in English].

## THE MARIUPOL TEXT IN CONTEMPORARY UKRAINIAN DRAMA AS A STUDY OF MEMORY AND A NEW COLLECTIVE SYMBOL OF GENOCIDAL PRACTICES

**Nataliia Yuhan**

Doctor of Philology, Associate Professor,  
Professor, Head of the Department of Romance and Germanic Philology,  
Professor at the Department of Literary Studies, Eastern Philology,  
and Translation, Luhansk Taras Shevchenko National University, Ukraine  
e-mail: ugannl2@gmail.com, orcid.org/0000-0001-6845-6731

### Summary

The article is dedicated to the analysis of the Mariupol text in contemporary Ukrainian dramaturgy as a study of memory and a new collective symbol of genocidal practices against the Ukrainian people. The methodology of the research is based on an interdisciplinary approach, combining strategies of literary analysis, the study of collective and historical trauma, memory studies, and postcolonial criticism. Theater and dramaturgy play a key role in the memorialization of Mariupol, transforming individual testimonies and experiences into artistic works that preserve the memory of the tragedy. Through theatrical art, contemporary Ukrainian plays preserve the authentic experience of survivors and honor the memory of those who perished. Documentary and postdramatic theater serve as a unique way to capture and convey the real experience of war. The use of eyewitness testimonies, excerpts from letters, diaries, and social media makes these performances as truthful and emotionally powerful as possible. This approach allows theater not only to inform but also to deeply impact the audience, compelling them to feel the horrors of war, the despair, and the hope of those who survived the Mariupol tragedy. The Mariupol text is gradually becoming a new national symbol of resistance that will remain in history as a reminder of the aggressor's crimes and the strength of Ukrainian resistance.

**Key words:** contemporary Ukrainian drama, Mariupol Text, documentary drama, post-drama, existential tragedy of Ukrainianness, postcolonial trauma, Memory Studies.

DOI <https://doi.org/10.23856/6911>

### 1. Introduction

The Mariupol tragedy became one of the most horrific war crimes of the 21st century, encompassing elements of blockade, mass killings of civilians, destruction of cultural objects, deportations, and the ruin of the city as a living space. The fall of Mariupol, after nearly three months of heroic defense, carved the image of the city into the national memory as a symbol of resilience, while also turning it into an embodiment of Russia's genocidal policies toward Ukrainians.

Since 2022, the so-called "Mariupol Text" has emerged in contemporary Ukrainian dramaturgy – an artistic-documentary layer that performs the function of memorialization, truth-fixing, and transmitting traumatic experiences. Today, an important issue is understanding how theater and dramaturgy participate in the creation of the national narrative of Mariupol and how these artistic forms become a vital tool for preserving national collective memory.

Although contemporary Ukrainian dramaturgy about the full-scale Russian invasion of 2022–2025 has attracted attention from researchers, the analysis of the Mariupol dramaturgical text has not been extensively explored until now. We can refer to the comprehensive work of O. Bondareva *"Mariupol Drama: Memorial Practices, Testimonies, Identity, and Theatrical Code"* (Bondareva, 2023). The article examines "Mariupol Drama", created by the Transcarpathian playwright Oleksandr Havrosh, based on interviews with actors who survived the bombing of the Mariupol theater building and are now reviving the Ukrainian Mariupol Drama Theater in Uzhhorod. The main intentions of "Mariupol Drama" correspond to a significant body of documentary-memorial sources. The author and creative team managed to fully realize several crucial discourses for Ukrainian collective memory: "Mariupol, which resisted the aggressor while being fully surrounded; war as unprocessed collective trauma and the cancellation of the narratives imposed by Russian propaganda; new collective Ukrainian identity that is being shaped in this war; and ultimately – theater as a special mystical space" (Bondareva, 2023: 32).

In one of our works, we explore the changing roles of women during the Russo-Ukrainian war, using dramas related to the Mariupol tragedy as material for analysis, such as Elena Petrovskaya's *"Fish Don't Cry"* (Yuhan, 2024). In the article *"Collective Trauma in (Post) Documentary Plays of Contemporary Ukrainian Drama about the Russian-Ukrainian War: Psycho-Emotional and Postcolonial Aspects"*, we examined the artistic reflection of the psycho-emotional and postcolonial components in the documentary and post-documentary plays of contemporary Ukrainian dramaturgy depicting the Russian-Ukrainian war of 2022 – 2025. The conclusions made can be useful when analyzing the plays of the "Mariupol cycle" (Yuhan, 2024a).

Thus, it can be concluded that the part of the Mariupol text that already exists and has been written in contemporary Ukrainian dramaturgy has not yet been fully explored. The topic addressed in this article is relevant and holds scientific novelty.

**The aim of the research** is to analyze the Mariupol text in contemporary Ukrainian dramaturgy as a study of memory and a new collective symbol of genocidal practices against the nation.

**The tasks** of the analysis of contemporary Ukrainian documentary postdrama are:

1. To define the specificity of the "Mariupol Text" in contemporary Ukrainian dramaturgy.
2. To analyze how theatrical practices form collective memory about the Mariupol tragedy.
3. To demonstrate how this text works as a symbol that goes beyond Ukraine and becomes the embodiment of genocidal practices in the modern world.

The research methodology is based on an interdisciplinary approach that combines literary analysis strategies, the study of collective and historical trauma, memory studies, and postcolonial criticism. In particular, the following are applied: *literary analysis* (receptive aesthetics, narratology) – to reveal the artistic-documentary techniques of representing collective trauma in dramaturgy about the Russian-Ukrainian war (works by H. R. Jauss, V. Iser, P. Ricœur); *the theory of collective and historical trauma* – to understand the transformation of traumatic experiences in performative narratives and their impact on identity (D. Alexander, K. Karuth, M. Blasco, T. Hübl); *memory studies* – to analyze the mechanisms of constructing and preserving historical memory through dramatic texts (P. Nora, M. Halbwachs, A. Assmann, J. Assmann); *postcolonial criticism* – to study dramaturgy as a space for decolonization, understanding colonial heritage, and forming new cultural subjectivity (M. Pavlyshyn, T. Gundorova, P. Ivanyshyn, O. Yurchuk). This methodological synthesis allows us to examine

the phenomenon comprehensively, considering both its artistic features and the deep cultural, social, and psychological aspects of the collective experience of war.

The material for this study is drawn from the plays of contemporary Ukrainian playwrights from the dramaturgical hub "Portal of Contemporary Ukrainian Dramaturgy "Ukrdramahub" (*Ukrdramahub*, 2022 – 2025), which discuss events in Mariupol, namely: Andriy Bondarenko *"Mariupol: Diaries of the Siege (Documentary Play)"* (2022), Kateryna Penkova *"Marathon "Russian Roulette" (2022)*, Irina Feofanova *"Ten Kilometers" (2022)*, Vitaly Karaban *"I Can't Even Imagine How You Do It" (2022)*, Tetiana Kytsenko *"Call It by Its Name (warning)" (2022)*, Elena Petrovskaya *"Fish Don't Cry" (2023)*, Olena Shevchenko *"What to Do with These Snot?" (2024)*, Alex Borovensky, Nina Zakhodzenko, Alina Romashko, Oksana Kovalova *"Once Upon a Time in Ukraine" (2024)*.

## 2. Mariupol Text: A Symbol of Tragedy, Memory, and Resistance

The Mariupol text is an artistic and documentary narrative that encapsulates stories about the destruction of the city of Mary, while simultaneously transcending its local theme to become a metaphor for shattered lives. It includes eyewitness testimonies, monologues, interview fragments, voice messages, diaries of civilian participants, and more, which are adapted into theatrical forms. Within it, personal pain is transformed into a collective experience, engraved in historical memory. Its structure is often nonlinear and chaotic, mirroring the dynamic nature of the catastrophe as it unfolded in real life.

The Mariupol text unfolds through profound existential dimensions that reflect tragedy, resistance, and the apocalyptic reality of the destroyed city.

One of the key aspects of examining the Mariupol tragedy in contemporary Ukrainian dramaturgy is the experience of genocide, manifesting in the systemic and deliberate destruction of the city and its inhabitants. The aggressor denied Ukrainians their very right to exist, as reflected in mass killings, forced deportations, blockades, and the destruction of cultural heritage. Mariupol became a symbol of barbarism, where not only the material environment was annihilated but also the cultural code of the Ukrainian people.

At the same time, Mariupol became a symbol of resilience, as its history of heroic resistance embodies the archetypal struggle of good versus evil. Both military personnel and civilian residents demonstrated incredible fortitude in the face of aggression. This recalls historical parallels – Stalingrad, the Warsaw Ghetto, the defense of Aleppo. The heroism of soldiers and civilians in Mariupol is inscribed in cultural memory as an example of self-sacrifice and the defense of dignity.

Mariupol also became an apocalyptic space where normal civilization ceased to exist. A city that was once a hub of life transformed into a zone of total devastation, where hunger, death, and basements serving as final refuges became the prevailing realities. The landscape of Mariupol took on the traits of an end-of-the-world scenario – a space without a future, where the complete physical and spiritual destruction of human existence unfolded.

Mariupol became the site of mass crimes whose brutality and scale evoke the tragedies of the 20th century, particularly the Holocaust and Holodomor. A city that had symbolized development and peaceful coexistence before the war turned into a space of genocidal terror. Mass graves, communal burials, and unrecognized victims serve as reminders of the systematic extermination of civilians orchestrated by Russian occupiers. As in Babyn Yar, where the Nazis executed people solely based on their nationality, civilians in Mariupol were annihilated in a denial of their right to life and Ukrainian identity.

One of the most horrifying crimes was the deliberate destruction of the Mariupol Drama Theater, where hundreds of civilians had sought refuge. Despite clearly visible markings reading "CHILDREN", meant to shield civilians from attacks, Russian forces deliberately bombed the building, killing those inside. This crime became a symbol of barbarism and the targeted extermination of innocent civilians. The theater, once a cultural center, turned into a mass grave, while its ruins stand as a memorial, reminding the world of the fragility of civilization in the face of war's cruelty.

Today, Mariupol is a point where history and the present intertwine, creating a new memorial space. The crimes committed in the city cannot remain solely a part of national tragedy – they acquire global significance, serving as reminders of history's darkest repetitions. Theater will continue to be an important symbol – a site of memory that helps process the experience of tragedy and the Ukrainian people's struggle for survival. Alla Kyrdon, distinguishing between individual and collective memory, emphasizes that to "confirm", "clarify", or even "fill in certain gaps", "individual memory can rely on collective memory". In turn, collective memory "revolves around individual memory without equating to it, evolving according to its own principles" (Kyrdon, 2016: 71). This strategy is particularly relevant for the plays that constitute the Mariupol text.

The Mariupol text in contemporary Ukrainian dramaturgy can be regarded as a unique literary phenomenon that reflects experiences of destruction, loss, survival, and rethinking identity. It emerges at the intersection of several crucial concepts: existential crisis, memory studies, collective trauma, and postcolonial re-evaluation. These are not merely artistic or documentary texts – they are the voice of a city that has endured a tragedy and has become a symbol of resilience.

### 3. The tragedy of Mariupol as the central theme of documentary dramas

by Andriy Bondarenko, Kateryna Penkova, Iryna Feofanova, and Yelena Petrovskaya

Andriy Bondarenko's drama "City of Maria: The Siege Diaries (Documentary Play)" (2022) (Bondarenko, 2022) can be seen as part of the Mariupol text through the lens of several important concepts.

**1. Existential Crisis.** The foundation of the play consists of diary notes and fragments of interviews with two sisters, Nastya and Anya, who survived the siege of Mariupol, managed to evacuate, and later moved to Georgia. The text is permeated with a sense of the loss of meaning in everyday life and the search for new meaning in a reality dominated by destruction and uncertainty, as well as a new understanding of oneself. The heroines find themselves in a constant state of survival, where basic human needs (food, warmth, security) come to the forefront. But alongside this, they try to preserve fragments of their previous life – lighting scented candles, wearing "going out" clothes. These are attempts to find meaning in the everyday that is being destroyed.

Bondarenko's depiction of the everyday war shows how human consciousness changes under the influence of crisis: "We used to hide from shelling, but now we walk under planes to fetch water" (Bondarenko, 2022). The texts also trace the motif of the rupture between peaceful life and the present: "I liked being an adult in Mariupol, "but this life is no longer attainable" (Bondarenko, 2022). The existential crisis manifests itself in a sense of powerlessness before the circumstances ("We didn't leave", "I was waiting for a sign that it would all end") and the necessity of adapting to a reality that is constantly changing.

The heroine of the play, Nastya, tries to answer a difficult psychological question that arose for anyone who witnessed the tragedy that took place in the city of Maria: "Many people asked – why did people stay so long before leaving? It's hard to explain, but I understand them. It's just shameful that you'll have to be homeless. That now you will be without your home. But you do have it – your own home! Leaving means admitting that your home, your world, your life no longer exists. It's very difficult and very hard" (*Bondarenko, 2022*).

Nastya feels the loss not only of her home but also of her own identity, which was inextricably linked to the city: "Now I don't know who I am anymore. My 'self,' my identity, were tied to the city where I lived. To the city that no longer exists. It has simply been wiped off the face of the earth" (*Bondarenko, 2022*). This shows how deeply the environment shapes our self-awareness: places, streets, buildings, the sounds of the city become part of our inner "self".

When a city is destroyed, it takes with it not only material things but also symbols, memories, and connections. Nastya seems to find herself in emptiness – she has lost her point of reference, the context in which she understood herself. Bondarenko describes a deep identity crisis, where a person is forced not only to mourn the loss but also to search for a new way of existence in a world where their former "self" no longer exists. This also suggests that for many, identity is not just a personal choice but a relationship with the place that gives meaning and defines who we are.

## **2. Memory Studies: Archiving War and Preserving the Past**

"City of Maria: The Siege Diaries" is also a way to record the memory of a city that endured a catastrophe. The text uses various "practices of recording" (diary, interview, witness monologue, recounting what was heard, etc.). As researchers note, all such practices "are built in a way that we must do something to capture and preserve information long after the human body can no longer provide it" (*Konnerton, 2004: 115*), and they form "collective memory" as "a set of conscious or unconscious recollections about experiences that have been lived through and (or) transformed into myth by the living community, to which the feeling of the past is inherently tied" (*Konnerton, 2004: 188*). However, one more remark must be made. While there is an evident high level of trust in the "memory of witnesses", it is also worth noting that we "manifest a greater skepticism toward it, which leads us to compare and verify sources. As often happens, the same event may be perceived and interpreted differently, even by direct witnesses or participants" (*Holka, 2022*).

The author frequently uses the contrast between peaceful life and war to emphasize the scale of loss. Interwoven into the diary entries and interviews are memories of pre-war Mariupol: the last autumn before the war, cafés, walks by the sea. A particularly significant aspect of the diaries is the documentation of horrors: the siege, the lack of water, cold, and fear. Anya reflects: "In those days, I often had the thought that I had thought too little about death before", "It was very scary and painful to leave my home, my whole life. It's good that we took some photos". Memory is generated through loss: "Grandmother's house is destroyed", "How good that grandmother and grandfather passed away and didn't see all this horror. They wouldn't have survived", "It turned out that Russian feminists are not our friends" (*Bondarenko, 2022*).

The Mariupol text, as a text of memory, is not just a testimony to war, but a way to remember the city as it was, so that its history does not disappear.

## **3. Collective Trauma: A Shared Voice of Pain and Loss**

In the text about Mariupol, not only individual but also collective trauma is heard, manifested in shared experiences, fears, and attempts to make sense of the tragedy: "We all slept in the hallway", "People began hiding, even the sun hid" (*Bondarenko, 2022*).



An important motif is the search for loved ones, the uncertainty about their fate. The phrase "Where are they? What happened to them?" is repeated, emphasizing the depth of loss and powerlessness in the face of war. The collective trauma of Mariupol is not only about physical destruction but also about the psychological dimension: the guilt of those who survived, the fear of the future, and the feeling of a broken connection with the native city.

#### **4. Postcolonial Dimension: Mariupol as a Space of Decolonization**

As is known, Mariupol existed for a long time in the shadow of imperial narratives. Soviet industrialization and Russian influence shaped the city's culture, and war became the breaking point with this past. In "City of Maria: The Siege Diaries", the process of decolonization of consciousness is reflected. The Russian-speaking heroines permanently switch to the Ukrainian language: "I am no longer a Russian speaker", "Eventually, I started to be proud of the fact that I changed. That I, a person who spoke Russian all my life and grew up in a Russian environment, managed to understand what is happening and what is important" (Bondarenko, 2022). The shift to the Ukrainian language is presented in the text as an act of resistance, a struggle for one's own subjectivity, and a rethinking of national identity.

Anya rejects imperial narratives: she realizes that even Russian activism is not solidaristic with Ukrainians. The girl propagates feminism, and she communicates in chats with feminists from the post-Soviet space. After the siege of Mariupol, she understood that "Russian feminists were first and foremost Russians, and their imperial thinking dominated, while the ideas of feminism were not their priority"; "They were just sitting in their national bubble. It turned out that our feminist friends are not our friends" (Bondarenko, 2022). The shift in Anya's worldview regarding national identity is an important aspect of postcolonial transformation.

The Mariupol text, based on "City of Maria: The Siege Diaries" by A. Bondarenko, as a postcolonial discourse, is not only a story about war but also about exiting the imperial paradigm, about the formation of a new Ukrainian identity. This play is a chronicle of an existential crisis, a depiction of the collective trauma of the nation, a method of archiving memory, and a symbol of the postcolonial transformation of Ukrainians under the pressure of an extreme situation. It shows how war changes a person, a community, and culture. And at the same time, it serves as a reminder: the memory of Mariupol should not fade away.

"The Marathon "Russian Roulette" (Penkova, 2022) is a documentary drama-monologue written verbatim by a participant in the events. An ordinary woman, displaced internally from Donetsk since 2014 with two daughters, is forced to become a military nurse in a bunker under the 3rd hospital in Mariupol. She sees this event, her strange transformation, as an example of a kind of "Russian roulette": "I became a nurse. That's how the circumstances played out" (Penkova, 2022). In the extreme situation of war, a person loses their identity and becomes who the circumstances force them to be. The heroine experiences the trauma of her younger daughter, the loss of her older daughter, who got lost in an area of the city on the other side of the Kalmius River and lost contact with her family for a long time. By a twist of fate, this story ends with a happy ending: the woman's ex-husband, who had stayed in the so-called "Donetsk People's Republic", comes to help the family and finds the older daughter. And this, again, in the heroine's opinion, is an act of "Russian roulette", because in this meat grinder of survival and life preservation, luck is a major factor. "According to official data, 87,000 people died in Mariupol. But how many more are unknown, missing, buried under debris in stairwells... Before February 24, the city had 430,000 residents. So, approximately every 5th person died" (Penkova, 2022).

This text is an incredibly powerful and painful testimony of war, intertwined with themes of existential crisis, collective trauma, memory studies, and postcolonial trauma.

The heroine constantly questions the meaning of life, the randomness of survival, and the injustice of what is happening. Her thoughts about God, who remains silent, about the miracle of survival, and why she remained alive while others did not, reflect classic signs of an existential crisis. This is especially clear in the lines: "Lord... You saved my life. I'm in the bunker. Why is my older daughter... where is she?" (*Penkova, 2022*). These are not just reflections; this is the cry of a soul, caused by the chaos and absurdity of war. The loss of a child, witnessing deaths, causes a religious conflict: why is God silent if He can save? "God is silent... What's wrong with Him? You know He resurrected His own Son, right? What is that called?" (*Penkova, 2022*).

A component of existential trauma is the symptom of the destruction of human dignity: "We stripped down to our skin and warmed ourselves with our bodies... We warmed ourselves like that. Because there was nothing. Nothing but our own bodies and our own lives" (*Penkova, 2022*). War strips people of normal life, forcing them to descend to the most basic survival needs.

The dramaturgical text conveys not only the experience of one person but the entire community that is experiencing the horrors of war. All together, in the bunker, they try to survive, share resources, and hug each other to stay warm. At the same time, the heroine watches as people around her lose loved ones, as they are forced to leave those who won't survive ("We left people there... because we knew they would die. There was nothing we could do to help" (*Penkova, 2022*)). The woman, together with other Mariupol residents, watches as the city slowly turns to ruins, much like Pompeii. Horror unites strangers; in the bunker, there are no longer separate individuals – they become a single entity.

The text performs the function of testimony, documenting what happened in Mariupol. It is not just a personal memory – it is the preservation of collective memory, which will become part of history. Even the details – how people in the basement warmed themselves with their bodies, how they collected medicines, how children sniffed the bread – all of this has enormous significance for understanding what survival in war means. The victims of the tragedy constantly compare the past and the present, showing how reality has changed: "We had a life. We argued, choosing between Netflix and HBO" (*Penkova, 2022*).

The documentary drama-monologue can also be viewed through the lens of postcolonial trauma, especially in the context of Russia's historical role as an empire that has been destroying Ukraine for centuries. The heroine directly addresses the enemy, expressing outrage and pain: "Lord, what do you bastards want here?! This is children's stuff. Not like traumatology. Children's traumatology, maternity hospitals, oncology" (*Penkova, 2022*). Russia, as an empire, destroys Ukrainians, disregarding the civilian population. In "The Marathon...", there is an awareness of the systematic aggression that is not accidental – it is a continuation of imperial policy that has lasted for centuries. The heroine testifies that the Russians intentionally bombed hospitals, disregarding international laws: "Red crosses drawn on cellophane. They know exactly that we're here" (*Penkova, 2022*).

"The Marathon "Russian Roulette" by K. Penkova is not just a testimony but a literary document that records the emotional, psychological, and social state of people during war. This text is harsh, painful, uncompromising, but necessary. It exposes the nature of war as a catastrophe that not only breaks bodies but also minds. It preserves the memory of what has been endured, transmits collective experience, and raises questions for which there are no answers. The drama is an important document of the modern era.

In the play "Ten Kilometers" (2022) by I. Feofanova (*Feofanova, 2022*), a twelve-year-old boy drags a sled with some kind of package along the shores of the Azov Sea. As the reader

and viewer gradually learn, the boy has suffered a tragic family loss – his father was killed when a rocket struck their home, his mother died in a basement where they had been sheltering with their dog, Aida, from Russian bombings, and Aida herself perished after stepping on a mine on the beach near the sea. This happened when the boy was trying to escape Mariupol and make his way to Berdyansk. Near his home, he created a family cemetery, burying his mother, father, and dog.

Mariupol in the play appears as a city devastated by siege, famine, destruction, and the mass death of civilians, drawing parallels to Leningrad during World War II. One of the most brutal methods of extermination is hunger. The play features a scene where basement residents argue over food shortages, and some even attempt to kill a dog for sustenance. This recalls the tragic events of the Leningrad blockade, where people, driven by despair, resorted to cannibalism.

Another horrifying parallel is the vast number of dead bodies left unburied. In the play, the boy describes how corpses lie in the streets because there is no place to bury them. A similar situation occurred in Leningrad, where the deceased were often left in the open due to a lack of resources and burial opportunities.

The bombing of civilians is also a central motif of the play. Russian aviation deliberately targets the Mariupol Drama Theater despite a large inscription reading "CHILDREN", which should have served as a sign of its untouchability. This echoes the bombings of civilian sites in Leningrad, where the enemy intentionally destroyed residential buildings, hospitals, and schools.

Beyond physical suffering, the city is also consumed by psychological collapse. The protagonist describes how people gradually lose strength and move through the streets "like zombies". This reflects eyewitness accounts of the Leningrad blockade, where people spoke of a state of "death apathy", when they stopped feeling pain, fear, or even the will to live.

Thus, the image of Mariupol in the play resonates with the tragedy of besieged Leningrad, illustrating the horrific consequences of war and the inhuman trials faced by civilians. Thus, fascism and russism demonstrate their identity.

The main character – the boy – is not just trying to survive the war but is also gradually losing faith in a world that no longer aligns with his understanding of justice and safety. One of the most painful moments for him is the collapse of his trust in his father's words. His father always believed that "Russians would not harm civilians", but reality proves otherwise – civilians become the primary victims of the war. For the boy, this is not just a horrifying fact but a profound rupture between expectation and reality, shattering his childhood perception of the world.

Equally painful is his confrontation with the absurdity of the new reality. In his memories, the boy returns to a peaceful life filled with art school, gifts, and calendars – symbols of stability and joy. But now these things seem foreign and meaningless. War erases the boundary between past and present, making his dreams unattainable. Feeling this loss, the boy constantly escapes into his memories. Flashbacks to happy moments appear in the text, as if attempting to preserve his identity amid the chaos of war. These brief memories become his last refuge, a fragile thread connecting him to a life that no longer exists.

Thus, the protagonist's existential crisis unfolds not only through physical suffering but also through the loss of faith in a comprehensible world, where there is no longer room for childhood notions of goodness, justice, and safety. The play captures not only the individual pain of the protagonist but also the collective trauma of an entire city that endured siege, famine, and mass death. This experience does not just destroy lives

but also threatens to erase the memory of the tragedy itself, turning it into nameless darkness.

One of the key symbols of memory in the play is the grandmother, who urges people not to forget who is responsible for their suffering. A quote from the play reads: "We should not be angry at each other but at those damned Moskals. They herded us into basements like rats. They took everything we had and called it "liberation". They can shove that "liberation" where the sun doesn't shine" (*Feofanova, 2022*). Her words emphasize that war is not just physical destruction but also a struggle for truth. In a world where the aggressor tries to hide its crimes, memory becomes an act of resistance.

Another powerful symbol is the motif of the calendar. The father used to cross out days, counting down the time until normal life would return. But after February 24, this habit loses meaning – time stands still. This symbolizes the breakdown of the usual order, the moment when life was divided into "before" and "after".

The inability to mourn losses also becomes a crucial aspect of collective trauma. The boy cannot bury his beloved dog in a dignified manner – instead, he drags her body on a sled, as if carrying an unbearable weight of memory. This metaphor illustrates how war denies people even the right to farewell and grief. The boy tries to gather all his deceased loved ones together, creating his own place of remembrance.

Thus, the play not only documents the horrors of war but also explores how memory of tragedy is formed – through pain, silence, broken rituals, and the struggle to preserve the truth. The play does not merely document war crimes but also reveals their colonial nature. Mariupol is depicted not just as a city under siege but as a symbol of resistance against an empire seeking to subjugate and annihilate its people. This war is not a conventional conflict but an attempt by Russia to impose its colonial "order" through violence, hunger, and terror.

The only hope in this situation is de-occupation. The boy's escape from Mariupol is not just a flight from war but a symbolic departure from a colonial space. He seeks to break free from the invader's control, to find freedom and survive. His journey mirrors the path of the entire Ukrainian people, who are striving to rid themselves of the imperial legacy.

The key words in the play are: "This is genocide". This is not just an assessment of events but an understanding that the war is aimed not only at the physical extermination of the population but also at the eradication of Ukrainian identity. "Someone in the basement kept saying that they wouldn't stop until they destroyed us all. This is genocide. We had just learned about genocide in school, in the fall. I remember thinking then: at least this will never happen again... But it did" (*Feofanova, 2022*). The genocide in Mariupol is a continuation of Russia's imperial policy, which for centuries has sought to erase Ukrainian culture, history, and memory. The play transcends a specific tragedy and raises global questions of colonial violence, resistance, and the struggle for the right to exist.

The text intertwines personal tragedy with historical memory, depicting Mariupol as a new Leningrad but through a different lens – the lens of postcolonial Ukrainian resistance.

The poignant lyrical monologue "Fish Don't Cry" (2023) by Yelena Petrovska (*Petrovska, 2023*) is a tragic narrative about a family's failed escape from Mariupol. Their car was shot at, Marta's husband and children were killed, and only she and a fish in an aquarium survived. Now, the woman wishes to forget that she is human and become a fish because fish have very short memories and cannot cry: "I used to be a human in my past life. But in this one – I am a Fish. And I don't want to be human anymore. It hurts. Being human", "Fish don't cry. They used to. But then they cried all their tears, and the sea turned salty. And now fish have

no reason to cry anymore. But people must. Because there isn't enough salt on earth. Especially during war" (*Petrovska, 2023*).

The drama is filled with reflections on life and death, on the boundary between existence and oblivion. Marta experiences a moment of existential choice: to remain in a world where she "no longer exists" or to step out of the car, symbolically departing into nothingness. Her words, "The main thing is not to die before death" and "Sometimes you think you're alive... but in reality, you're already gone", point to a liminal experience, a loss of subjectivity in the conditions of war. She is no longer "human" but rather a fish, adapting to a new reality of silence.

The text portrays the destruction of memory as a survival mechanism. Memory appears as the main enemy: "The scariest thing is memory. Not death, no. And not hunger. No. Memory..." (*Petrovska, 2023*). Marta loses her sense of time ("just five seconds"), attempting to reconstruct the past in fragments: the mythology of Mariupol intertwines with personal memories. Her narration of the city resembles a ghostly tour – she reconstructs a reality that no longer exists or exists only in her fractured consciousness.

Mariupol in the work is not just a setting but an embodiment of trauma itself, shaping the structure of the narrative. The fragmented storytelling, repeated phrases ("we're driving, driving... still haven't left..."), and chaotic movements of the characters convey the psychological state of those who have survived catastrophe. The symbolic scene with the Violinist and scattered sheets of paper highlights the loss of control over reality. The themes of losing loved ones, fear, and a peculiar detachment – where the consciousness, in an attempt to protect itself, distances from pain ("He is already sleeping soundly") – demonstrate psychological defense mechanisms that allow a person to endure unbearable circumstances.

The text echoes postcolonial discourse by depicting Mariupol as a space where "our own attacked us". The protagonist struggles to distinguish between enemies and "her own people", as the colonizer, pretending to be "one of us", turns out to be the aggressor. Even the history of the city in her monologue is filled with moments of destruction and reconstruction, symbolizing the cyclical nature of violence.

Y. Petrovska's lyrical monologue "Fish Don't Cry" is a unique Mariupol existential drama that explores the limits of human existence in the face of catastrophe. It embodies the pain of loss, uncertainty, collective trauma, and the impossibility of full recovery.

#### **4. Mariupol as a Chronotope, Now Associated with Genocidal Practices (Based on the Plays by O. Shevchenko, A. Borovensky and Co., V. Karaban, T. Kiytsenko)**

Almost every play in contemporary Ukrainian drama about the war of 2022–2025 accentuates the concept of Mariupol. It plays a significant role in the works of Vital Karaban "I Can't Even Imagine How You" (2022), Tetiana Kytsenko "Call Things by Their Names (warning)" (2022), Olena Shevchenko "What to Do with This Snot" (2024), and Alex Borovensky, Nina Zakhovenko, Alina Romashko, and Oksana Kovalova "Once Upon a Time in Ukraine" (2024).

In Olena Shevchenko's play "What to Do with This Snot?" (2024) (*Shevchenko, 2024*), which consists entirely of voice messages from the refugee Oksana, who is in Greece, Cyprus, with her young son, the protagonist's exhaustion from hard work and emotional struggles is vividly depicted. Oksana transfers her anxieties about her sick child to the mothers and children in Mariupol:

"I don't know what a mother felt or did when her child was dying in a basement in Ukrainian Mariupol. Simply because, in the 21st century, in the middle of developed Europe,



the mother had no paracetamol. She could have called an ambulance, but there was no connection. And ambulances don't drive under bombs and bullets. She could have run out under the bombs and bullets herself. But whom to ask for that paracetamol, when the streets were empty? What did she do? Did she press a cloth to the child's forehead? Cry, pace in circles, scream? I don't want to think about it. I can't think about it" (*Shevchenko, 2024*).

This excerpt powerfully reflects the deep existential crisis experienced by a Ukrainian refugee in Europe. Her narration intensifies the sense of confusion, fragmented thoughts, and unspeakable helplessness. Oksana can neither change the situation nor fully comprehend it – thus, her words in the finale take on a tone of rejection. This signifies an attempt to shield herself from unbearable pain while also underscoring her heightened empathy, which becomes part of her own trauma. The contrast between the expected safety of the civilized world and the reality of destruction and suffering makes this passage particularly painful and poignant.

In the documentary post-drama, dystopia, and philosophical drama "Once Upon a Time in Ukraine" (2024) (*Borovenskyi et al., 2024*) by Alex Borovensky, Nina Zakhozenko, Alina Romashko, and Oksana Kovalova, the discourse of Mariupol is crucial and one of the most significant themes. One of the main characters, the Russian-speaking Masha, initially embodies a character from the well-known Russian animated series "Masha and the Bear", which carries imperial narratives of the "Russian world". Later, Masha transforms into Maria, who becomes the city of Maria – Mariupol.

"Masha: Hello. I am your Mariupol.

The enemy has knocked out my glass eyes-windows.

See my blackened walls? He burned my body.

He is dismantling me piece by piece – brick by brick – because he is searching for my soul.

My people.

I shield them as best I can.

They say I am a fortress.

And I am holding on.

I am holding on while they fight for me.

I must endure" (*Borovenskyi et al., 2024*).

Maria recalls the school, where "there were many children, very loud, very noisy", which contrasts with the current emptiness of the city. This is not only nostalgia for a peaceful past but also the realization that this past can never return. The children's play is interrupted by the reality of war, emphasizing the loss of the familiar world.

Mariupol in this fragment of the post-documentary drama-verbatim is personified – it speaks, suffers, resists. The city is perceived by the authors as a living entity and a subject of trauma. The lines "I am your Mariupol. The enemy has knocked out my glass eyes-windows. He burned my body" (*Borovenskyi et al., 2024*) create the image of a city as a wounded yet indomitable being. It is not merely a backdrop or setting – it experiences the pain of war itself. The phrase "They say I am a fortress. And I am holding on" resonates with the mythologeme of the hero city, which, despite destruction, remains a symbol of resistance. However, this image is ambivalent: a fortress city is both strength and a prison, from which there is no escape.

The repetition of the words "Further. Further. Further" resembles a trance state that reflects the psychological shock of the characters, their inability to comprehend the horrors of war in a linear sequence. The cyclical structure – when Sasha (another main character in the drama) "does not know where to start, so he starts from the end" – is a reflection of traumatic experience, where memories are mixed, and the past, present, and future merge into one.



The authors of the drama emphasize that "Around the city is a wall. Around the city is war" – a closed circle with no way out. The city does not merely suffer from war – it is surrounded by it, engulfed by it. This idea echoes the real experience of besieged Mariupol, where people found themselves trapped without communication, food, water, or the possibility of escape.

This excerpt exemplifies the Mariupol text through its fragmentation, combination of the real and the metaphysical, personification of the city, cyclical structure, contrasts between past and present, and the totality of destruction. It not only documents the tragedy of Mariupol but also reproduces it through language, structure, and rhythm, allowing the reader or viewer to experience it on an emotional level.

The "Mariupol text" emerges in the dramas of Vital Karaban "I Can't Even Imagine How You Are" (2022), and Tetiana Kytsenko "Call Things by Their Names (war-ning)" (2022) (*Karaban, 2022*), through the introduction of characters from Mariupol who serve as emblematic bearers of the tragic experience of the Russo-Ukrainian war and collective trauma, as well as through the example of renaming the Soviet city of Zhdanov to the Ukrainian city of Mariupol.

In V. Karaban's drama "I Can't Even Imagine How You Are", characters who have endured the catastrophe of Mariupol are present. They are not merely witnesses to the war but symbolic carriers of the experience of occupation, blockade, and destruction of the city. Their stories personalize the tragedy, making it more tangible for the viewer or reader. Through them, collective trauma is conveyed, transcending individual pain to become part of national memory.

The mention of renaming Zhdanov to Mariupol in Tetiana Kytsenko's reflective play "Call Things by Their Names (war-ning)" (2022) underscores Ukraine's struggle for its cultural identity. Zhdanov represents Soviet colonial history, while the restoration of the name Mariupol is an act of decolonization, reconnecting with historical roots. Within the context of the "Mariupol text", this takes on new significance: the city's past struggle for its name echoes its contemporary fight for survival.

Thus, these dramatic texts do not merely mention Mariupol; they expand and deepen the "Mariupol text" as a phenomenon, adding personal, historical, and national dimensions to it.

## **5. Documentary Drama as a Means of Preserving the Memory of Mariupol: Poetic Features**

War transforms not only people's lives but also art, compelling it to seek new forms of reflecting reality. Contemporary Ukrainian documentary drama and monodrama have become crucial tools for capturing the tragedy of Mariupol, as they preserve the voices of witnesses, the experiences, and the emotions of those who lived through it. These plays are based on real documents: testimonies of Mariupol residents, fragments of conversations, social media posts, and excerpts from war diaries.

One of the main features of post- and documentary drama is the use of authentic sources (*Yuhan, 2023: 181*). Recordings of conversations, excerpts from social media and diaries create a sense of presence and authenticity. The audience or reader does not just immerse themselves in a documented story but becomes a witness to real events. This allows the truth about the war to be preserved, which is especially crucial in the face of information warfare and attempts to distort historical facts.

The use of such sources makes theatrical productions about Mariupol particularly poignant. They allow audiences to feel the pain and fear of people who survived the blockade and

shelling while also immortalizing the memory of the dead. This is also a form of resistance against oblivion and indifference since documentary texts remain unchanged, and their emotional power impacts every viewer.

Modern Ukrainian documentary plays about Mariupol have distinct characteristics. Their structure is often fragmented, reflecting the chaos and shock of real wartime experiences. Instead of traditional narrative lines, these works create a polyphony of voices that together form a mosaic of collective suffering.

Thus, documentary drama becomes a crucial means of preserving historical memory and truth about Mariupol's tragedy. It not only reconstructs events but allows for a profound emotional experience, ensuring that the truth endures in a world where it is constantly under threat of distortion or erasure.

Russian propaganda seeks to erase evidence of crimes in Mariupol, but theater serves as a platform for preserving the truth. Through art, the struggle for historical memory continues, as artistic interpretation of the tragedy helps to embed these events in the collective consciousness. Thanks to theater and documentary drama, Mariupol becomes not just a symbol of loss but an integral part of national identity, reminding people of the necessity to resist historical distortion.

Theater plays a vital social role – it becomes a space for public mourning and rethinking the tragedy. Readers, along with the author and the play's protagonists, undergo a process of understanding pain and loss, helping society to heal. Performances based on Mariupol residents' testimonies transform into a ritual of remembrance, aiding in processing loss, comprehending its significance, and preventing such tragedies from recurring in the future.

Just as Babyn Yar became a symbol of the Holocaust, Mariupol is becoming an embodiment of war as a genocide against Ukrainians. This city is not just a site of tragedy but a symbol of resilience, shaping a new Ukrainian identity. Through documentary performances and artistic dramatic texts, Mariupol is affirmed in the national narrative as a symbol of struggle, suffering, and hope. It is a reminder of the price of freedom and the strength of a nation that, despite immense losses, continues to fight for its independence.

## 6. Conclusions

Theater and drama play a crucial role in the memorialization of Mariupol, transforming individual testimonies and experiences into artistic works that preserve the memory of the tragedy. Performances based on real events not only recreate the harrowing moments of war but also serve as a means of collective trauma processing, fostering societal awareness and reflection on the past. Through theatrical art, the authentic experiences of survivors are preserved, and the memory of those who perished is honored.

Documentary and post-dramatic theater provide a unique way to capture and convey the real experience of war. The use of eyewitness testimonies, excerpts from letters, diaries, and social media makes these performances profoundly truthful and emotionally powerful. This approach enables theater not only to inform but also to deeply affect the audience, compelling them to feel the horrors of war, the despair, and the hope of those who lived through the tragedy of Mariupol.

The "Mariupol text" is gradually becoming a new national symbol of resistance, destined to remain in history as a reminder of the aggressor's crimes and the strength of Ukrainian resilience. Just as Babyn Yar became a symbol of the Holocaust, Mariupol embodies both the

suffering and the indomitable spirit of Ukrainians. Through theatrical productions, documentary plays, and artistic interpretations, this theme continues to resonate, reminding future generations of the victims of the Russian-Ukrainian war of 2022 – 2025, while also affirming the unwavering strength of the nation.

## References

1. Bondarenko, A. (2022). *Misto Marii: shchodennyky oblohy (Dokumentalna piesa) [The City of Mary: Diaries of the Siege (A Documentary Play)]*. <https://www.ukrdramahub.org.ua/play/misto-mariyi-shchodennyky-oblohy> [in Ukrainian].
2. Bondareva, O. (2023). *Mariupolska drama: memoratyvni praktyky, svidchennia, identychnist, teatralnyi kod [Mariupol Drama: Memorial Practices, Testimonies, Identity, Theatrical Code]*. *Visnyk Mariupolskoho derzhavnoho universytetu. Serii: Filolohiia*, 28, 32-57. [in Ukrainian]. DOI 10.34079/2226-3055-2023-16-28-32-57
3. Borovenskyi, A., Zakhozenko, N., Romashko, A. & Kovalova, O. (2024). *Odnogo razu v Ukraini [Once Upon a Time in Ukraine]*. <https://www.ukrdramahub.org.ua/sites/default/files/texts/odnogo-razu-v-ukraini.pdf> [in Ukrainian].
4. Feofanova, I. (2022). *Desiat kilometriv [Ten Kilometers]*. Ukrdramahub. <https://www.ukrdramahub.org.ua/play/desyat-kilometriv> [in Ukrainian].
5. Holka, M. (2022). *Suspilna pamiat ta yii implanty [Collective Memory and its Implants]*. *Per. z polsk. K.: Nika-tsentr* [in Ukrainian].
6. Karaban, V. (2022). *Navit ne uiavliaiu, yak ty [I Can't Even Imagine How You Are]*. <https://www.ukrdramahub.org.ua/play/navit-ne-uyavlyayu-yak-ty> [in Ukrainian].
7. Konnerton, P. (2004). *Yak suspilstva pamiataiut [How Societies Remember]*. *Per. z anhl. K.: Nika-tsentr* [in Ukrainian].
8. Kyrdon, A. (2016). *Heterotopii pamiaty: Teoretyko-metodolohichni problemy studii pamiaty [Heterotopias of Memory: Theoretical and Methodological Issues in Memory Studies]*. K.: Nika-Tsentr [in Ukrainian].
9. Kytsenko, T. (2022). *Nazvaty svoimy imenamy (war-ning) [Name st by sts Own Name (war-ning)]*. <https://www.ukrdramahub.org.ua/play/nazvaty-svoyimy-imenamy-war-ning> [in Ukrainian].
10. Nora, P. (2014). *Teperishnie, natsiia, pamiat [Present, Nation, Memory]*. *Per. z frants. K.: KLIO* [in Ukrainian].
11. Penkova, K. (2022). *Marafon "rosiiska ruletka" [Marathon "Russian Roulette"]*. Ukrdramahub. <https://www.ukrdramahub.org.ua/play/marafon-rosiyska-ruletka>
12. Petrovska, Ye. (2023). *Ryby ne plachut [Fish Don't Cry]*. Ukrdramahub. <https://www.ukrdramahub.org.ua/play/ryby-ne-plachut> [in Ukrainian].
13. Shevchenko, O. (2024). *Shcho robyty z tsymy sopliamy [What to Do with These Snotty Noses]*. <https://www.ukrdramahub.org.ua/play/shcho-robyty-z-tsymy-soplyamy> [in Ukrainian].
14. Ukrdramahub (2022 – 2025). <https://www.ukrdramahub.org.ua> [in Ukrainian].
15. Yuhan, N. (2023). *Between Documentary (Verbatim) and Experimental Theater: Poetic Features of the Genre of Modern Biographical Drama (Based on Comparative Analysis)*. *The 1st International Scientific and Practical Conference "Modern Knowledge: Research and Discoveries" (May, 19 – 20, 2023; Vancouver, Canada)*. A.T. International, (179-197) <https://doi.org/10.51582/interconf.19-20.05.2023.018>

16. Yuhan, N. (2024). *Collective Trauma in (Post)Documentary Plays of Contemporary Ukrainian Drama about the Russian-Ukrainian War: Psycho-Emotional and Postcolonial Aspects*. *KELM*, 8 (68), 132-149.
17. Yuhan, N. (2024). *Zhinochyi pohliad na rosiisko-ukrainsku viinu: feminni roli ta stratehii podolannia psykholohichnykh i postkolonialnykh travm u tvorakh suchasnoi ukrainskoi dramaturhii [A Woman's Perspective on the Russo-Ukrainian War: Feminine Roles and Strategies for Overcoming Psychological and Postcolonial Traumas in Contemporary Ukrainian Drama]*. *Problemy humanitarnykh nauk: zbirnyk naukovykh prats Drohobyt'skoho derzhavnoho pedahohichnoho universytetu imeni Ivana Franka. Seriiia "Filolohiia"*, 59, 81-92 [in Ukrainian]. DOI: <https://doi.org/10.24919/2522-4565.2023.59.10>

## INNOVATION, WORK, SOCIETY

GOOD GOVERNANCE AS A CONCEPT OF (POST-)WAR ECONOMY  
RECOVERY INFRASTRUCTURE

Glib Aleksin

Ph.D., Assistant Professor, Vadym Hetman Kyiv National Economic University, Ukraine  
e-mail: aleksin.glib@kneu.edu.ua, orcid.org/0000-0003-2586-5986

**Summary**

This research explores the evolution of the concept of Good Governance as a fundamental requirement for effective recovery policy in the context of wartime and post-war economies. The core principles of Good Governance – responsibility, transparency, inclusivity, efficiency, public participation, and the rule of law – are investigated as tools for reestablishing stability and trust between citizens and the state in a crisis environment. A historical-comparative analysis of the implementation of Good Governance in post-war France, Korea, Bosnia, and Herzegovina is conducted to identify the essential components for successful institutional modernization and foreign support. The network-based approach to governance analysis used in this study highlights the interactions between prominent actors, including the government, business, media, civil society, and foreign partners, to offer effective governance during a crisis. The findings indicate that the efficiency of Good Governance is more influenced by the institutional capacity of the governance network and the level of coordination than by the structure of the political system. The relevance of foreign experiences in developing Ukraine's strategic recovery plans based on Good Governance is evaluated. Future research will focus on implementing the concept of Good Governance in post-war recovery efforts in Ukraine.

**Key words:** Good Governance, post-war recovery, institutional stability, transparency, international support, war in Ukraine.

DOI <https://doi.org/10.23856/6912>

**1. Introduction**

Resilient and open governance has become essential for efficient management in the context of growing global insecurity and escalating hybrid threats. Originally created in peacetime as a normative framework for guaranteeing democratic legitimacy and institutional efficiency, the idea of Good Governance is progressively being redefined in wartime and post-war recovery contexts. Its application in (post-)war settings is not only normative but also functional: it becomes a structural necessity for recovering legitimacy, restoring public confidence, guaranteeing the rule of law, and organizing multi-level responses to difficult crises. Often resulting in the fragmentation of governmental power, compromised accountability mechanisms, and a decline in public service delivery, the challenges of war disturb institutional routines and exacerbate socioeconomic inequalities. Under such circumstances, the fundamental principles

of Good Governance – transparency, inclusivity, participation, accountability, effectiveness, and the rule of law – become increasingly important, providing a toolkit for institutional recovery and policy coherence in an unstable environment.

Using a historical-comparative perspective, this study investigates the development and applicability of Good Governance models in wartime and post-war recovery. Focusing on how institutional capacity, citizen participation, and international assistance are coordinated to recover state functions and stimulate long-term development, this research examines the governance models embraced in France following World War II, Korea after the Korean War, and Bosnia and Herzegovina following the 1990s Balkan war. Studies (UNDP, 2017) reveal that the quality of intersectoral coordination and the resilience of institutional networks define the efficacy of governance in post-war situations more than the official type of political system. Building on this insight, the paper adopts a network-based approach to governance analysis to map the interactions of major actors – government institutions, the private sector, citizens, international donors, and media – thereby reconstructing post-war architecture for a better social order.

This approach is particularly relevant in the current case of Ukraine, where the convergence of institutional fragmentation, war, massive migration, and an influx of foreign aid creates a notably complex governance environment. Understanding how effectively previous post-war settings function can aid in crafting Ukraine's recovery plan, emphasizing institutional stability and civic confidence through critical direction. This research contributes to the theoretical and empirical enhancement of governance models that are not only normatively sound but also empirically validated under the challenges of war and reconstruction by examining the achievements and limitations of foreign experiences.

## 2. Good Governance: retrospective analysis and contemporary lessons

Good Governance is a key tool for stabilizing and restoring the economy during war and in the post-war stage of development, creating a foundation for the effective functioning of institutions in crisis conditions (Yu, 2000). The basis of Good Governance consists of several fundamental principles: transparency, accountability, efficiency, participation, public activity, respect for the rule of law, and the management system's ability to respond quickly and effectively to new challenges. These principles are especially vital for post-war development, as they create conditions for restoring trust between citizens and the state, help overcome social divisions, and support reforms. Transparency and accountability serve as tools for preventing corruption and ensuring the effective use of resources, including international aid. The formation of social capital encourages citizen participation in decision-making processes and helps consolidate the efforts of various stakeholders in post-war recovery. Participation allows marginalized groups to influence the formation and implementation of policies, which is particularly important amid mass population displacement and the social transformations caused by war (Basheer, Elagib, 2024). Justice, along with the restoration of trust in the legal system and the prevention of violence, depends on the rule of law. Accordingly, in the (post-)war economy, the concept of Good Governance not only defines the strategic path of change but also creates the institutional foundation for its implementation. By ensuring a balance between security, economic, and social priorities, Good Governance is a crucial component of forming an adequate recovery policy (Boogaard et al., 2018).

The historical analysis of implementation examples for Good Governance in post-war economies of the 20th century allows us to identify effective ways to implement the principles of appropriate governance in Ukraine. After World War II, France introduced an economic



planning strategy known as the Monnet Plan (Rossiter, Quirk, 2017). This plan combined the democratic involvement of citizens in the formation of the institutions of the Fifth Republic with centralized resource management. This period was also marked by significant external support through the Marshall Plan, which facilitated the integration of external resources into national recovery policy. In Korea, despite the local peculiarities of the social structure in the first decades after the war, five-year economic development plans were successfully implemented, laying the foundation for the rapid development of the national economy in the 2000-2020s and reforming the education system (Xing, 2024). In combination with US assistance, this contributed to the formation of an effective mechanism for long-term development. In Bosnia and Herzegovina, after the war of the 1990s (Vukojević, 2023), a federal governance model was established with dominant international control through the Office of the High Representative (OHR), anti-corruption mechanisms, and an infrastructure of oversight by the EU, NATO, and the UN. However, the efforts did not yield the desired results, and the country remained ethnopolitically divided and dependent on external actors.

A comparative analysis of the selected cases indicates that, despite the different forms of political systems – from parliamentary democracy in France to a federal structure with international influence in Bosnia and Herzegovina – the effectiveness of Good Governance largely depends on the level of interaction between the main participants in the process: institutions, citizens, the private sector, the media and international partners. The results of the analysis are summarized in Table 1.

Table 1.

**Comparative analysis of cases of implementation of Good Governance principles in post-war France, Korea, Bosnia and Herzegovina**

Criterion	France	Korea	Bosnia and Herzegovina
Type of political system	Parliamentary democracy	A developing country with elements of authoritarianism	A federal system with international influence
Transparency	Parliamentary oversight, reports	Centralized planning	External oversight through donor structures
Accountability	Constitutional mechanisms	Administrative bureaucracy	Donor accountability
Management efficiency	Monet Plan, nationalization	Five-year plans, industrialization	Dependent on external players
Citizen participation	Elections, referendums	Educational and community initiatives	Limited due to ethnic polarization
International support	Marshall Plan	US support	EU, NATO, UN

In this context, the network approach allows us to consider the architecture of Good Governance during times of crisis. The state is responsible for the strategic planning and implementation of reforms, serving as the central link in the network of Good Governance. Citizens contribute to public oversight and the promotion of community interests. The private sector aids in restoring the economy, primarily by ensuring adequate levels of investment and employment. The population, which is the beneficiary of the policy, is engaged through feedback channels such as local self-government and public hearings. The key to this network is the availability of reliable transparency tools, which the media cannot claim in Ukraine due to their own discredit (KIIS, 2025).

The results of the analysis point to several conclusions. First, good governance during and after war depends on strategic vision, coordinated interaction between sectors, and genuine citizen participation in the decision-making process. Second, network analysis serves as a guide for further modernization of institutions and a tool for identifying weaknesses in the system of good governance. Third, the experiences of countries such as France, Korea, and Bosnia and Herzegovina illustrate that good governance can take different forms but has a single essence; the effectiveness of good governance relies on the quality of interaction among actors in the established management network, rather than on the formal political system.

### 3. Good Governance in (post-)war economy model

The development of a functional and adaptive governance framework in wartime and post-war environments requires the creation of an integrated model that connects ethical principles, institutional design, stakeholder coordination, and context-specific responses. Based on a comparative investigation of France, Korea, and Bosnia and Herzegovina, a Good Governance in (post-)war economy model is proposed that aligns normative governance ideas with the actual mechanisms of post-war reconstruction. This concept is grounded both in theoretical foundations and in the practical dynamics observed in countries managing institutional recovery during significant crises.

Fundamentally, the approach is organized around five interdependent domains: (1) normative principles of governance; (2) strategic institutional architecture; (3) participatory engagement mechanisms; (4) network coordination and responsiveness; and (5) adaptive integration of international support. Each domain acts as a cornerstone of governance and a dynamic mechanism allowing system-wide resilience.

First, as guiding principles that shape every level of decision-making, the *normative principles of the governance* domain support the ethical foundations of Good Governance, namely transparency, accountability, participation, rule of law, and efficiency. Particularly in crisis situations, when the loss of confidence and legitimacy aggravates societal disintegration, these ideas shift from abstract concepts to practical guidelines. While inclusivity and involvement help legitimize state activities among communities, transparency and legal clarity serve as counterpoints to corruption and elite capture.

Second, the approach emphasizes *strategic institutional architecture* as a means of operationalizing these normative values. Institutions in a post-war context must be quickly rebuilt or re-legitimized to meet immediate requirements and create the foundation for long-term development. For instance, France's post-war Monnet Plan demonstrates how centralized planning can be reconciled with democratic accountability. In contrast, the experience of Bosnia and Herzegovina highlights the danger of institutional incoherence and overreliance on outside players, thereby compromising local ownership and long-term viability.

Third, because public confidence cannot be rebuilt without active citizen participation, *participatory engagement mechanisms* are a critical component of the concept. Participation goes beyond voting; it also includes local meetings, public hearings, decentralized government, and ways for underprivileged populations to influence reconstruction goals. This participatory infrastructure is particularly important in situations of mass relocation, where reconnection between people and the state must be actively established, serving as the link between state strategy and social legitimacy.

Fourth, using a network governance perspective to understand how various actors – governmental agencies, citizen groups, media, private businesses, international institutions – interact

to achieve successful governance, the model encompasses a *network coordination and responsibilities* domain. It indicates that the level of coordination among actors not only influences the state's capacity but also affects institutional efficiency in (post-)war contexts. As the examples of Korea and France illustrate, robust governance systems characterized by mutual trust, shared knowledge, and coordinated resource allocation are more likely to yield positive recovery outcomes. Conversely, fractured or externally imposed networks – such as those observed in Bosnia and Herzegovina – face the risk of cultivating dependency and dysfunction.

Fifth, the field of *adaptive integration of international support* addresses how national interests could be reconciled with outside aid – whether financial, technical, or political – without compromising sovereignty. International assistance for post-war governance has a bipolar effect: it might inspire changes or strengthen outside reliance. The model suggests that effective situations control this integration through strategic alignment, local absorptive capacity, and co-designed frameworks, thus transforming help into a vehicle for sustainable development rather than temporary stabilization.

A feedback loop of monitoring, learning, and recalibration connects these five dimensions. Designed to be flexible, the model recognizes that political dynamics, security issues, and societal expectations all influence governance in (post-)war environments in a nonlinear manner. The system's ability to learn from its own mistakes, absorb external knowledge, and modify processes determines institutional resilience.

The suggested model advances the knowledge of Good Governance not just as a normative benchmark but also as a system of interrelated activities that respond to the political, economic, and social upheavals of war by combining historical lessons with modern problems. It is especially relevant to Ukraine's recovery, as institutional integrity, civic inclusion, and the smart use of foreign funding will define the course of post-war reconstruction. Thus, the model serves as a roadmap for operationalizing governance improvements in transitional and weak economies, as well as a diagnostic framework. The proposed model is presented in Table 2.

Table 2.

**Good Governance in (post-)war economy model**

<b>Governance domain</b>	<b>Policy objective</b>	<b>Key policy instruments</b>	<b>Risks if ignored</b>	<b>Metrics for evaluation</b>
Normative-principled governance	Ensure ethical consistency and restore public trust	Legal frameworks, transparency mechanisms, anti-corruption laws	Legitimacy crisis, corruption, civic disengagement	Trust index, transparency ratings, legal compliance scores
Strategic institutional architecture	Rebuild functional and legitimate institutions	Central planning bodies, civil service reform	Institutional fragmentation, administrative collapse	Institutional performance audits, policy execution rates
Participatory engagement mechanisms	Promote inclusive and democratic participation	Public consultations, decentralized governance, local forums	Social exclusion, civic unrest, policy failure	Participation rate, inclusion indicators, satisfaction surveys

<b>Governance domain</b>	<b>Policy objective</b>	<b>Key policy instruments</b>	<b>Risks if ignored</b>	<b>Metrics for evaluation</b>
Network coordination and responsiveness	Enable multi-stakeholder coordination and responsiveness	Inter-agency taskforces, digital platforms, feedback channels	Policy incoherence, duplication, ineffective delivery	Coordination efficiency index, multi-actor collaboration scores
Adaptive integration of international support	Align external aid with national priorities	Donor coordination units, absorptive capacity programs, joint implementation plans	Donor dependency, misalignment, ineffective recovery	Aid absorption rate, donor harmonization score, impact assessments

This governance model provides an integrated, evaluative framework for leading state and non-state actors through post-war reconstruction by emphasizing ethical governance, institutional capacity, civic involvement, policy coordination, and international collaboration.

#### **4. Conclusions**

This study concludes that the concept of Good Governance holds significant functional relevance in both war and post-war settings. A comparative historical analysis of France, Korea, and Bosnia and Herzegovina illustrates that applying Good Governance values, i.e. transparency, accountability, participation, rule of law, and efficiency, is not only normative but also essential for rebuilding trust, stabilizing institutional functions, and aligning national priorities with international support mechanisms.

The analysis shows that the degree of network coordination among important actors – state institutions, citizen groups, the business sector, media, and international donors – shapes the effectiveness of post-war governance more than it does the formal type of political regime. Strong, flexible, and participative institutional architectures (the case of post-war France) indicate more viable recovery paths than those where outside control replaced local legitimacy, as seen in Bosnia and Herzegovina.

Good governance in (post-)war economic models operationalizes governance through five interconnected domains: normative-principles governance, strategic institutional architecture, participatory engagement mechanisms, network coordination, and responsiveness and adaptive integration of international support. This model not only outlines the roles and hazards associated with each domain but also proposes quantifiable metrics for evaluating the resilience and efficiency of political systems under crisis conditions.

By strengthening institutional integrity, guaranteeing inclusive policymaking, and effectively directing international assistance, this model provides a strategic roadmap for Ukraine's post-war recovery. Tailored to the complex dynamics of Ukraine's recovery landscape, marked by institutional disintegration, mass displacement, and heightened geopolitical instability, the model's network-based and evaluative structure facilitates a flexible yet coherent approach.

Future studies should focus on the effective implementation of this model in Ukraine by using empirical case studies and governance diagnostics to monitor the adoption of Good Governance concepts. Transforming normative frameworks into real-world recovery results also depends critically on developing policy tools to enhance coordination, increase local absorptive capacity, and ensure civic inclusion. Thus, good governance becomes not only a conceptual foundation but also a useful tool for sustainable post-war development.

## References

1. UNDP. (2017). *Institutional and coordination mechanisms*. Retrieved from: [https://sustainabledevelopment.un.org/content/documents/2478Institutional\\_Coordination\\_Mechanisms\\_GuidanceNote.pdf](https://sustainabledevelopment.un.org/content/documents/2478Institutional_Coordination_Mechanisms_GuidanceNote.pdf)
2. Yu, T. F. (2000). *A new perspective on the role of the government in economic development*. *International Journal of Social Economics*, 27(7/8/9/10), 994–1013. <https://doi.org/10.1108/03068290010337279>
3. Basheer, M., & Elagib, N. A. (2024). *Armed conflict as a catalyst for increasing flood risk*. *Environmental Research Letters*, 19(10), 104034. <https://doi.org/10.1088/1748-9326/ad6fb6>
4. Van Den Boogaard, V., Prichard, W., Benson, M. S., & Milicic, N. (2018). *Tax revenue mobilization in conflict-affected developing countries*. *Journal of International Development*, 30(2), 345–364. <https://doi.org/10.1002/jid.3352>
5. Rossiter, C., & Quirk, W. J. (2017). *Constitutional dictatorship*. In Routledge eBooks. <https://doi.org/10.4324/9781315080536>
6. Xing, J. (2024). *The impact of U.S. foreign aids on the Post-War development of South Korea*. *Transactions on Social Science Education and Humanities Research*, 5, 246–251. <https://doi.org/10.62051/gt6kqm39>
7. Vukojević, S. (2023). *Government Formation in Multi-level Settings: Evidence from Post-Dayton Bosnia and Herzegovina*. *Društvene I Humanističke Studije*, 8(1(22)), 173–196. <https://doi.org/10.51558/2490-3647.2023.8.1.173>
8. KIIS. (2025). *Dynamics of trust in social institutions in 2021-2024*. Retrieved from: [https://www.kiis.com.ua/?lang=ukr&cat=reports&id=1467&page=1&fbclid=IwZXh0bgNhZW0CMTAAAR0UNT6lYBZK40x1A76We2K6Syg4LSxARi3NZ1oz\\_0ZVGbQkwlykmZh8sp4\\_aem\\_NXO\\_O1mwV55VizFYgRLYKw](https://www.kiis.com.ua/?lang=ukr&cat=reports&id=1467&page=1&fbclid=IwZXh0bgNhZW0CMTAAAR0UNT6lYBZK40x1A76We2K6Syg4LSxARi3NZ1oz_0ZVGbQkwlykmZh8sp4_aem_NXO_O1mwV55VizFYgRLYKw)

## PHILOSOPHICAL CONCEPT OF THE XXTH CENTURY BY ALAIN BADIOU

**Mariia Bratasiuk**

Doctor of Philosophy, Professor,

Professor at the Department of Philosophy,

Ivan Franko National University of Lviv, Ukraine

e-mail: bratasiuk123@gmail.com, orcid.org/0000-0002-9216-0911

**Summary**

The article highlights the views of the famous, somewhat controversial French philosopher A. Badiou on the past century. In the context of current events, in particular, the current Russian-Ukrainian war, this understanding is relevant, since the past directly affects the present. This analysis provides an opportunity to better understand what the present century is and can be. The thinker explores the 20th century using the method of interiorization, looking at the subject of study from within itself, examining it through the prism of its own art, poetry, literature, documents, etc., rather than just dry facts.

A. Badiou emphasizes that the past century constantly sought to implement the project of creating a new man, proposed by F. Nietzsche, who was to appear as a negation of the old, imperfect man. It was an unsuccessful project, the new man was never created. But its creation was paid for with tens of millions of human lives.

This project was a project of rupture and foundation. The century emerged as openly voluntarist, contradictory, since the ontology of Life and the voluntarist rupture of its continuity turned out to be incommensurable. The means of creating a new man was terror in the Soviet era, in China, Nazi Germany, Cambodia, etc., and at the same time, the beginning of something qualitatively different was proclaimed. The philosopher concludes that the past century was a passionate fascination with the real, even in its most horrific forms.

The century constantly sought to achieve final victory by means of absolute war, supposedly the most just, and not local, unjust ones. Obsessed with the heroic, it did not think about the cost of this victory. The twentieth century emerged as a century of total division. Destruction as a method of creating something new has been used in all spheres of life. A. Badiou proposes a method of subtractive thinking to minimize differences and overcome total division. Since the division is not overcome, the 21st century will be a century of war – this is the disturbing conclusion the philosopher came to.

**Key words:** voluntarism, human project, new man, subjectivity of the century, destruction, split, passion of the real, subtractive thinking.

DOI <https://doi.org/10.23856/6913>

**1. Introduction**

Understanding the past and the present is necessary because it allows us to see in which direction human progress is being made, how it is being made, to see this progress from the inside, to see where and how individual nations and humanity as a whole are heading, to draw appropriate conclusions and to a large extent to predict the future. A. Badiou, as a result of his research of the last century, came to the conclusion that the 21st century will be a century of war (*Badiou, A., 2019*).



The current Russian-Ukrainian war, which has already become a planetary phenomenon, confirms his conclusion and further exacerbates the problem of knowing the past and the present. How did it happen that in the 21st century, before the eyes of the civilized world, in particular the European one, a 140-million Nazi state was formed, which started this bloody tragedy? How will the world live after this war, how will it change? Will it draw the right conclusions from this bitter experience?

And what should be done so that the 21st century does not repeat this tragedy again? – these and other questions require deep philosophical reflection. The past is connected with the present by thousands of threads, visible and invisible. And since this is so, the study of the relationship between the past and the present will undoubtedly always be a relevant problem.

**The purpose of the article is** to highlight the philosophical views of Alain Badiou on the peculiarities of the development of the 20th century, his considerations regarding the avoidance of past mistakes by humanity for the sake of peace and security.

## 2. Analysis of recent research and publications

Separate aspects, facets, fragments of the mentioned problem were carried out by both Ukrainian and foreign authors. Among the Ukrainian authors, this problem was studied by: *Artyukh, V. (2010)*, *Lypynsky, V. (2010; 2013)*, *Hrushevsky, M. (1993)*, *Dontsov, D. (2005)*, *Pavlenko, Yu. (1996)*, *Proleev, S. (2017)*, *Sabadukha, V. (2019)*, *Syrotova, A. (2005)*, *Potulnyzky, V. (2002)* *Franko, I. (1986)*. This problem was the subject of reflection by such foreign authors as: *Nietzsche, F. (2016)*, *Jaspers, K. (2015)*, *Aleksievich, S. (2017)*, *Applebaum, E. (2023)*, *Toffler, O. (2000)*, *Spengler, A. (2005)*, *Harari, Y. (2018)*, *Fukuyama, F. (2020)* *Snayder, T. (2023)* etc. The interrelationships of the past and the present, the new and the old, the meaning of history and nonsense, the factors of historical development, determinism and voluntarism, humanism and totalitarianism, man and the era, the influence of the spirit of the era on man and vice versa, the stages of historical progress, the globalization of the modern world, etc. were analyzed. What is happening to us today has already matured to a large extent in the last century. A. Badiou analyzes the last century, looking at it from the middle of it.

And he will see in it reality and cruelty, hysteresis and avant-garde, finite and infinite, humanism and anti-humanism (*Repa, A. 2019*). Based on his research, the philosopher will conclude that the twentieth century, like no other, demonstrated the "passion of the real." In view of the above, it is interesting and relevant to analyze A. Badiou's views on the peculiarities of the historical development of the last century

### 3. A. Badiou on the origins of the tragedies of the 20th century

A. Badiou is a writer and philosopher. He belongs to the direction of French philosophy, whose representatives strive to create so that philosophy and literature do not exist each by itself, but are intertwined, because the concept and life cannot be separated, since the invention of writing ultimately consists in giving the concept a literary life. Thanks to this invention, the thinker believes, "a new figure of the subject is created", a new subject appears, a new battle for the subject is carried out (*Badiou, A. 2019, p.240*). This "new battle" is necessary because the subject created by Descartes on the basis of ratiocentrism is far from life, because it is rationally and technically imperfect, because there are dark sides to life, something hidden, unclear – that's why French philosophers made efforts to discover such a subject. A. Badiou also made his contribution to this creative work.

In order to better see the subject of his understanding, the philosopher gives this century the opportunity to express itself, feeling it, listening to it, feeling it from within itself, "in interiorization" (A. Repa). "I strive to think it (i.e., the century – M.B.) and to show how conceivable it is," notes A. Badiou (*Badiou, A. 2019, p. 29*). For him, it is very important to get as close as possible to the subjectivity of the time under study. He wants to know how the century thought, what it thought about itself, so he turns to the documents of that era, works of literature, poetry, art and seeks to capture in them the spirit of the time, its feeling of itself. This method worked effectively. The century suffered from cruelty, in some periods it was beyond measure. Politics at some stage became tragic, so it is important to understand why this happened? Where are the origins of the tragedies of the twentieth century? And he comes to the conclusion that "from some point the century was carried away by the idea of changing man, creating a new man" (*Badiou, A. 2019, p.31*).

The "new man" was created by the Bolsheviks, Maoists and German Nazis. But in order to create a new man, it was necessary to destroy the old, previous man. And he was really destroyed without pity. In parallel, they discussed the old man as he is. The project to create a new man was so radical, writes A. Badiou, that in implementing it, no one took into account the uniqueness, unity, and unrepeatability of human life. "The project of a new man in this sense was a project of rupture and foundation," it was implemented, maintaining the same subjective tone at the level of history and the state (*Badiou, A. 2019*).

According to the philosopher, this project was particularly unsuccessful, because a new person was never created, except, perhaps, the Soviet one, and tens of millions of people were destroyed by the project. Nowadays, there is no project to create a new person, everyone, on the contrary, is trying to preserve a natural, organic person, especially often lawyers write and talk about this in connection with the practical application of the theory of natural human rights. But people are being "improved", work on modifying the species is being carried out at the genetic and technical level without any project, notes A. Badiou. He warns that this work is driven by the automatism of profit, benefit, which is very characteristic of the century under study with its such active "calculating" thinking (M. Heidegger) (*Heidegger, M. 1998*) and this is alarming, because the consequences can be very negative. A radical change in humanity is taking place and in this sense, loyalty to the mental gaps of the beginning of the century has been preserved. This technical automatism also works against man.

In the thinking of the last century, man is thought of as a very imperfect, human animal, a partial being transcended by life, who is not in accordance with either Life or History. Therefore, the century thinks in categories that rise above man: class, party, nation, proletariat, race, etc. And this is something more than an individual, therefore it is fair to sacrifice him, so imperfect, for the sake of the prosperity of this greater. The twentieth century is a century of violence against man, life, history, in contrast to the nineteenth century, which wanted to agree with them. The twentieth century opposes itself to history, tries to forcefully push or push it into certain directions and frameworks. It is enough to turn to the theory and practice of Soviet Bolshevism to be convinced of this. This century, according to A. Badiou, is frankly voluntarist, since its subjects apply violence to history in order to force it to serve them. The century is permeated with questions of the relationship between life and voluntarism, and how can one not see here a direct connection of this voluntarist thinking with the ideas of F. Nietzsche, in particular, his will to life and to power (*Nietzsche, F., 1993*), the idea of the Superman, who does not accept generally accepted rules, neglects universal human values (*Nietzsche, F. 1993*), which did not contribute to the harmonious coexistence of subjects and history. The incommensurability between the ontology of life and the theory of voluntarism, their distinct imbalance,

observed throughout the century, according to A. Badiou, is its effective subjectivity. The dialectic of will and life determines the constant dissonance, inconsistency, tension that permeates this entire century (*Badiou, A. 2019*).

Given this characteristic, the continuity of life can be realized only in a voluntarist rupture. And here again there is a connection with the work of F. Nietzsche, in whom the superman can appear only by overcoming the man who is the bridge from the animal to the superman. To realize the idea of the superman, it is necessary to "break the history of the world in half", that is, to make an absolute rupture, to change the civilization that has gone bankrupt (*Nietzsche, F. 1993*). The twentieth century imposes a heroic interruption on the continuity of life by means of terror, therefore the essence of the century-beast is life. But it pours out waves of blood, suffering, multiplies death. This century treats man with extraordinary ruthlessness. In the poetry of the first half of the 20th century, notes A. Badiou, the inseparability of life and death is affirmed.

#### 4. Characteristics of the 20th century in the philosophical visions of A. Badiou

The philosopher focuses on the contradictory nature of the last century, which, despite misanthropy, thinks of itself as the beginning of a new era, lives by the promises of a qualitatively new existence. The subjectivity of this time period claims to be a qualitatively new organization of the relationship between the beginning and the end. There is so much violence that it becomes almost the main means of solving pressing problems. A. Badiou emphasizes that the century is very ambitious and at the same time miserable, its chance is lost, despite all its claims and promises to implement a qualitatively new one. It doubts itself, loses its viability. Realizing the promises of the nineteenth century, it breaks ties, transforms into the barbarism of a bankrupt civilization. It multiplies the horrors of the real for the sake of a bright future, compromising this bright goal, because the means of achieving it, obviously, are very different from it. A. Badiou rightly notes that the revolutionaries

This century was most fascinated by the real. It was the maximum rapprochement with him up to the adoption of his most terrible forms (*Badiou, A. 2019*), (*Aleksiyevych, S. 2017*), (*Badiou, A. 2005*). A. Badiou concludes that this is an era that has lost its meaning, an era of meaninglessness. While the nineteenth century was the century of knowledge, the twentieth century became the era of denial of knowledge. In this century, M. Heidegger will write about "paths that lead nowhere" ("Holzwege"), that is, about the same loss of meaning of the epoch, will criticize the attitude of the rational-centric epoch to being, aimed at the maximum spread of power over this being, the model of man as a "lord of being" instead of a "shepherd of being" (*Heidegger, M. 1998*); (*Heidegger, M. 1997*). He will criticize the metaphysical tradition as "forgetting being", neglecting its sovereignty, the attempts of a person to rise, to dominate him, to frame him with a Procrustean bed of certain concepts and principles ("preconceptions"), etc. (*Heidegger, M. 2022*). In literature, for example., I. Bonnefoy presents an image of a path that is erased, and a feeling of a complete world is created. The era doubted the comprehension of real morality and scientific knowledge. This is a time of a kind of absurdity, in which the individual is only an "unstable sign of forces and conflicts" (A. Badiou) that dominate himself. This is an alarming image of a person of this century, because a person of a conflict type will create the same existence around him.

The century is permeated with "disjunctive synthesis" (J. Deleuze), disunity, non-dialectical connection between necessity and will, irreconcilability that guides all thoughts of this voluntary time. Voluntarism is becoming a subjective will, slowly transforming into a cult,

and it literally absorbs Europe in the first half of the twentieth century, and not only Europe. Violence is blessed with the creation of a new person. The use of the old man as a material is justified by the struggle for the new man. And so the century has been constantly at war, being a violent continuity, engulfed in the idea of an absolute war, some of the most important, the greatest, which will end all other wars, more local, less important. It is very effective century, writes A. Badiou. It did what it declared, and it was the passion of the real, which is the key to understanding the whole century (*Badiou, A. 2019*). But this efficiency, transformation is very aggressive, exhausting, murderous, through them the real "on the other side of good and evil" unfolds (F. Nietzsche). Liberalism and humanism become declarations, their content is emasculated. The subjects of the century do not care about the price paid for the implementation of a new person's project. And the correctness of this conclusion is difficult for A. Badiou to question. This indifference is sometimes simply outstanding, as in the case of the Soviet experiment. For the creation of the species *homo sovieticus* or "red man" (S. Alexievich), tens of millions of lives of others, people of the old type, were paid. The intensity of the action exceeded moralistic sentimentality. It was a century of absolute war as a way to establish a qualitatively new era, so they did not care about its cost. The expressive passion of the real went off scale (*Badiou, A. 2019*).

A characteristic feature of the last century, according to A. Badiou, was its obsession with achieving the final, and the century undertook to implement it by means of destruction. The destruction of the old imperfect person ensures the appearance of a new one. Through the total destruction of all sorts of local "wrong" wars, eternal peace is achieved. Science destroys old theories by means of destruction. Art also uses destruction, destroying the relative world of representation. However, the philosopher rightly notes, the destruction of the old and the creation of the new are different tasks. The century lives by implementing a model of conflict, mismatch, aggressiveness, imbalance, war, which will mark the beginning of a new historical and planetary order based on the ubiquitous schism at the interpersonal level, between the old and the new, between civilizations, peoples, cultures, etc. The model of irreconcilability is a fighting model of the real, so it appears as a split at all levels. Applying the philosophy of numbers, the philosopher argues that in the last century. The law of the world becomes not 1, but 2, which does not imply any harmony, correspondence, unity of the parties, their balance, etc. (*Badiou, A. 2019*). The subjectivity of the century, therefore, is in the paradigm of the final war and establishes a non-dialectical contradiction between foundation and destruction. These are alarming conclusions given the interdependence of the past and the present, old and new, subjective and objective, etc.

Twentieth century, according to A. Badiou, asserts the effect of ignorance, unknowability, at the same time like the nineteenth century asserted the effect of knowledge and cognition. Twentieth century is definitely demonstrated the passion of ignorance. It creates appearance, passing it off as reality, emphasizes the perception of appearance as art. For him, a mask, fiction – this is the real!. Thus, it demonstrates the gap between visibility and reality. That is, the twentieth century. appears far from harmony and alignment, orderliness and partnership, which means that the next XXI will be in many ways similar to the previous era.

In order to somehow overcome the model of splitting, A. Badiou proposes the idea of subtractive thinking and believes that the discussion of subtractive thinking and destruction is the central discussion of the century. While destruction is destruction, destruction, subtractive thinking about negativity is able to overcome the blind imperative of destruction (*Badiou, A. 2019*). It is more moderate, more careful, more caring, imbued with preservation, not destruction. It demonstrates a passion that seeks to find a minimum of differences as opposed to a maximum of destruction.

## 5. Conclusions

Summarizing the above, it should be stated that in the philosophy of the last century A. Badiu reflects a number of his characteristic features. In particular, it is emphasized that the basis of the entire last century is the project of creating a new man, the project of rupture and foundation, the project of destroying the old man as a prerequisite for the creation of a new one, so it turned out to be very unsuccessful.

It is noted that the twentieth century opposed to history, challenged it, wanted to conquer it and thus asserted itself as a voluntarist century. It demonstrated the incommensurability of life continuity and voluntarism. This century was at the same time the end, the decline and the beginning of a new one, the founding of a humanity reconciled to itself, which is also impossible to reconcile. The century was very effective, obsessed with achieving the final, developed according to the model of irreconcilability, so it appeared in various directions as a schism. The contradiction between destruction and foundation permeates the entire past century, so the next century, predicts A. Badiu, will be a century of war. His conclusion turned out to be prophetic, the current century, being a continuation of the past, is already experiencing the Russian-Ukrainian war, which has become a planetary phenomenon (*Applebaum, En. 2023*); (*Bernard-Anri, Levie 2022*); (*Snyder, T. 2023*); (*Fukuyama, F. 2022*).

## References

1. Bad'yu A. (2019) *Stolittya. Per. z fr. A.Ryepa [Century. Translated from French. A. Repa.]* Lviv. Aneta Antonenko Publishing House. 304 s. [in Ukrainian]
2. Artyukh V. (2010) *Tyahlist' istoriyi y istoriya tyahlosti: ukrayins'ka filosofs'ko-istorychna dumka pershoyi pol. XX st. [Continuity of history and the history of continuity: Ukrainian philosophical and historical thought of the first half of the 20th century].* Monohrafiya. Sumy: Publishing house SumDU, 266 s. [in Ukrainian]
3. Lypyns'kyi V. (2010) *Lysty do brativ-khliborobiv [Letters to the Brothers-Growers].* Kyiv: Tempora. Vol. 1. 560 s. [in Ukrainian]
4. Lypyns'kyi V. (2013) *Lysty do brativ-khliborobiv [Letters to the Brothers-Growers].* Kyiv: Tempora. Vol.2. 624 s. [in Ukrainian]
5. Hrushevsky M. (1993) *History of Ukraine-Rus. V 6 T. [History of Ukraine-Rus]: in 6 volumes.* Kyiv, Vol. 3. 503 p. [in Ukrainian]
6. Dontsov D. (2005) *Dukh nashoyi davnyiny. De shukaty nashykh istorychnykh tradytsiy [The Spirit of Our Antiquity. Where to Look for Our Historical Traditions. The Spirit of Our Antiquity].* K.: MAUP, P. 137–559. [in Ukrainian]
7. Pavlenko Yu. (1996) *Istoriya svitovoyi tsyvilizatsiyi [History of World Civilization].* Kyiv. Lybid. 356 p. [in Ukrainian]
8. Prolyeyev S.V. (2017) *Kryza identychnostey v hlobal'nomu sviti ta ideya Yevropy. Dialoh i porozuminnya dlya yevropeys'koyi ta svitovoyi spil'not (Iz zaluchennyam tvorchoho dosvidu L'vivs'ko-Varshavs'koyi shkoly). Kolektyvna monohrafiya. Za zah. red. prof.. A.Karasya. L'viv, 2017. 216 s. S.4.[The crisis of identities in the global world and the idea of Europe. Dialogue and understanding for European and world communities (With the involvement of the creative experience of the Lviv-Warsaw school). Collective monograph. Edited by prof. A. Karas. Lviv, 216 p. P.4. [in Ukrainian]*
9. Franko I. (1986) *Mysli o evolyutsiyi v istoriyi lyuds'kosti. Tvory u 20 t. [Thoughts on evolution in the history of humanity. Works in 20 volumes].* K: Naukova dumka. Vol.45. P.76-139. [in Ukrainian]



10. Sabadukha V. O. (2019) *Metafizyka suspil'noho ta osobystisnoho buttya: monohrafiya* [Metaphysics of social and personal existence: monograph]. Ivano-Frankivsk: IFNTUNH. 647 p. [in Ukrainian]
11. Zakhara I. (1997) *Lekzii z istorii filosofii* [Lectures on the History of Philosophy]. Lviv: LBA. 398 s. Zakhara-I.-Lektsii-z-istorii-filosofii.pdf (lnu.edu.ua) [in Ukrainian]
12. Snyder, T. (2023). "Russophobia", igri vie zhertvu ta normalizatia genotsidou. Promova Timothy Snider na Radbesi OON na You Tube ["Russophobia", victim games and the normalization of genocide. Timothy Snyder's speech at the UN Security Council on You Tube]. URL: <https://youtu.be/zEnD1nmLQ8k> [in English]
13. Loyko O. (2024) *Prysmerek Europy O.Spenglera* ["Twilight of Europe" by Spengler. Oleksandr Loiko] "Присмерк Європи" Шпенглера. Олександр Лойко – YouTube [in Ukrainian]
14. Kruglyakov V.Ye. (2020) *Suchasnaya yevropeyskaya nauka i technical vie istoriko-philosophicus osmislenny Karla Yaspersa* [Kruglyakov V.E. Modern European Science and Technology in the Historical and Philosophical Understanding of Karl Jaspers]. URL: <https://inb.dnsgb.com.ua/2015-3/7.pdf> [in Ukrainian].
15. Toynbi A. (1995). *Doslidzhennya istoriyi. U 2-kh t.* [Studies in History. In 2 volumes]. Kyiv. 610 p. [in Ukrainian]
16. Nitshe F. (1993) *Zhadannya vldy. Tak kazav Zaratustra; Zhadannya vldy / per. z nim. A. Onyshka, P. Tarashchuka.* [The Desire for Power. Thus Spoke Zarathustra; from German by A. Onyshko, P. Tarashchuk] K.: Osnovy, P. 330–414. [in Ukrainian]
17. Orteha-i-Hasset KH. (1994) *Bezhkhebetna Ispaniya / per. z isp. V. Burghardta, V. Sakhna, O. Tovstenka. Vybrani tvory* [Spineless Spain / trans. from Spanish by V. Burghardt, V. Sakhna, O. Tovstenka. Selected Works] K.: Osnovy, P. 140–195. [in Ukrainian].
18. .Ortega-i-Hasset KH. (1994) *Bunt mas / per. z isp. V. Burghardta, V. Sakhna, O. Tovstenka. Vybrani tvory* [Revolt of the masses. trans. from Spanish by V. Burghardt, V. Sakhna, O. Tovstenka. Selected Works] K.: Osnovy. P. 15–139. [in Ukrainian]
19. Alekseyevych S. (2017) *Chas second-hand (kinets' chervonoyi lyudyny) .* [Second-hand Time (the end of the red man).]. K.: Dukh i Litera. 464s. [in Ukrainian]
20. Toffler O. (2000). *Tretya khvylya.* [The Third Wave]. Kyiv: "Vsesvit". 480 p. [in Ukrainian]
21. Fukuyama F. (2023) *KINETS'ISTORIYI VZHE SKORO? Pro shcho pyshe Frensis Fukuyama? YouTube* [IS THE END OF HISTORY COMING SOON? What does Francis Fukuyama write about?] КИНЕЦЬ ІСТОРИЇ ВЖЕ СКОРО? Про що пише Френсіс Фукуяма? – YouTube YouTube [in English]
22. Fukuyama F. (2020) *Identychnist'. Potreba v hidnosti y polityka skryvdzhenosti.* [Identity. The Need for Dignity and the Politics of Offense]. Kyiv: "Nash format" 168 p. [in Ukrainian]
23. Harari Y. (2018) *21 urok dlya 21 stolittya* [21 Lessons for the 21st Century]. Force Ukraine. 416 p. [in Ukrainian]
24. Nietzsche F. (1993) *Tuck kazav Zaratustra* [Thus said Zarathustra. Thus said Zarathustra; Desire for power / trans. with him. A. Onyshka, P. Tarashchuka]. Kyiv: Osnovy Pp. 8 – 326.
25. Bad'yu A. (2005) *Tayemna catastrophe* [Secret catastrophe. Sociologos] 2005. №5. Almannac. 2005. C. 269–299. [in Ukrainian]
26. Heidegger Martin (2022) *Pro myslenia, buttea ta nudgu* [Heidegger Martin on thinking, being and boredom]. URL: Мартін Гайдеггер про мислення, буття та нудьгу (kmb.ua) [in Ukrainian]
27. Heidegger M. (1998) *Buttea vie okoli rechey. Voznyak T. Eexty ta pereklady.* [Being in the Vicinity of Things. Vozniak T. Texts and translations]. Kharkiv: Folio. P.332-345. [in Ukrainian]



28. Heidegger M. (1997) *Urivki essay iz zbirk "Holzwege"*. [Excerpts from the collection "Holzwege"]. URL: <http://old.zounb.zp.ua/node/6652> [in Ukrainian]
29. Repa A. (2019) *Vicne stolittya. Peredmova. Badiu A. Stolittya*. Lviv. Vydavnytvo Anetty Antonenko. [Eternal Century. Foreword by Badiu A. Century. Lviv. Edited by Anetty Antonenko]. Lviv. 304 p. [in Ukrainian]
30. Syrotova A. (2005) *Analys tsivilizatsiynoi kontseptii rozvytku u poglyadakh A.Spenglera*. [Analysis of the civilizational concept of development in the views of A. Spengler]. URL: 2005-2 ([uzhnu.edu.ua](http://uzhnu.edu.ua)) [in Ukrainian]
31. Potulnytskyi V.A. (2002) *Ukraine i vsesvitnya istoria: istoriosofia svitovoy ta ukrainskoi istorii XII- XX st.* [Ukraine and World History: Historiosophy of World and Ukrainian History. XII-XX centuries. Kyiv: Lybid]. Kyiv: Lybid. 352 p. [in Ukrainian]
32. Applebaum, Enn (2023). *Pro smertelnu imperialistychnu ideyu Russii, naslidki kontrnas-tupu ZSU ta zakinczenna viiny na You Tube* [Anne Applebaum on Russia's deadly imperial idea, the consequences of the counteroffensive of the Armed Forces of Ukraine, and the end of the war on You Tube] URL: <https://youtu.be/gOlgsH6g7OU> [in English].
33. Bernard-Anri, Levie (2022). *Pro rosiyski fascism, naivnist Macrona ta film "Slava Ukraini" na You Tube* [Bernard – Henri Lévy on Russian fascism, Macron's naivety and the film "Glory to Ukraine" on You Tube] URL: <https://youtu.be/Np5VfDAIlo0> [in English].
34. Fukuyama, F. (2022, 03.22): *putinska viina proti liberalnogo poryadku – lokalna istorlia* [Putin's War Against the Liberal Order – Local History] ([localhistory.org.ua](http://localhistory.org.ua)) [in Ukrainian].

## ANALYSIS OF PSYCHOLOGICAL ASPECTS OF THE FORMATION OF A PROJECT GROUP. SYSTEMATIC APPROACH

**Olena Chepurna**

Candidate of Physical-Mathematical Sciences, Associate Professor at the Department of Cybersecurity, National University “Odesa Law Academy”, Ukraine  
e-mail: chepurna@onua.edu.ua, orcid.org/0000-0002-1432-0799

**Olena Tsilmak**

Doctor of Juridical Sciences, Professor, Head of the Department of Psychology, National University “Odesa Law Academy”, Ukraine  
e-mail: cilmalen@gmail.com, orcid.org/0000-0001-7348-4876

**Yuliia Loboda**

Candidate of Technical Sciences, Associate Professor at the Department of Information Technologies, National University “Odesa Law Academy”, Ukraine  
e-mail: loboda@onua.ua, orcid.org/0000-0001-7083-552X

### Summary

This article explores the psychological dimensions of project group formation, advocating a systematic approach to enhance group cohesion and performance. The hypothesis asserts that integrating psychological principles – motivation, group identity, role clarity, and psychological safety – optimizes group formation processes. Utilizing Social Identity Theory, Tuckman’s group development model, and Self-Determination Theory, the study examines how individual and collective behaviors shape early group dynamics. Methods encompass general scientific approaches (analysis, synthesis, induction, deduction), theoretical research, historical analysis, statistical modeling, and mathematical formulation. A systematic framework, supported by statistical data and a mathematical model, is proposed to guide project managers. Practical recommendations address challenges like conflict, cultural diversity, and virtual team dynamics, bolstered by empirical evidence. The findings emphasize the universal relevance of psychological factors in project management. Future research directions include advanced metrics and virtual team adaptations.

**Key words:** group dynamics, system analysis, psychological safety, motivation, role allocation, team cohesion, project management, statistical analysis.

DOI <https://doi.org/10.23856/6914>

### 1. Introduction

The formation of a project group is a critical phase in project management, where psychological dynamics significantly influence group cohesion, collaboration, and success (Forsyth, 2018: 12). As organizations increasingly rely on project-based structures to address complex challenges – such as technological innovation, legal reforms, or infrastructure development – understanding the psychological aspects of group formation is essential. This article employs a systematic approach to analyze these aspects, integrating psychological theories, empirical insights, statistical data, and a

mathematical model to propose a structured framework for creating high-performing project groups.

The novelty of this study lies in its synthesis of psychological principles within a systematic methodology, augmented by quantitative tools and enriched with recent literature, addressing gaps in project management research that often overlook human factors (*Kozlowski & Ilgen, 2006: 79*). The research aims to demonstrate that a systematic approach, grounded in psychological theory and supported by statistical and mathematical analyses, mitigates challenges like conflict, disengagement, and misaligned expectations, thereby enhancing group performance.

**Research Objectives.** To identify and analyze key psychological factors influencing project group formation.

To develop a systematic framework for integrating psychological principles into the group formation process.

To incorporate statistical data and a mathematical model to quantify group dynamics.

To provide actionable recommendations for project managers to foster cohesive teams.

**Methodology.** The study employs general scientific methods (analysis, synthesis, induction, deduction), theoretical research (from abstract to concrete), historical analysis, statistical analysis, and mathematical modeling. Key theories include Social Identity Theory (*Tajfel & Turner, 1979: 33*), Tuckman's group development model (*Tuckman, 1965: 384*), Self-Determination Theory (*Deci & Ryan, 2000: 227*), and psychological safety (*Edmondson, 1999: 350*). Statistical methods include correlation, regression, and ANOVA, while the mathematical model quantifies group cohesion.

The article is structured as follows: Section 2 reviews psychological theories; Section 3 presents statistical data; Section 4 proposes a systematic framework; Section 5 introduces a mathematical model; Section 6 discusses practical applications and challenges; and Section 7 presents conclusions and future research directions.

## 2. Psychological Theories of Project Group Formation

The formation of a project group is shaped by psychological theories that elucidate individual and collective behaviors, providing a foundation for understanding early group dynamics.

Social Identity Theory (*Tajfel & Turner, 1979: 33*) posits that individuals derive self-concept from group membership, influencing their commitment and behavior. Fostering a shared group identity during the forming stage – through clear articulation of project purpose – aligns individual identities with collective goals, reducing subgroup divisions, particularly in diverse teams (*Hogg & Terry, 2000: 121*).

Tuckman's Group Development Model (*Tuckman, 1965: 384*) outlines five stages: forming, storming, norming, performing, and adjourning. The forming stage is critical, setting the tone for trust and role clarity. Psychological challenges, such as uncertainty or anxiety, necessitate structured interventions to build rapport (*Forsyth, 2018: 45*).

Self-Determination Theory (*Deci & Ryan, 2000: 227*) emphasizes intrinsic and extrinsic motivations, suggesting that engagement increases when needs for autonomy, competence, and relatedness are met. For example, co-defining roles enhance autonomy, while recognizing expertise bolsters competence (*Ryan & Deci, 2017: 67*).

Psychological Safety (*Edmondson, 1999: 350*) enables members to express ideas without fear of judgment. A lack of psychological safety stifles communication and innovation, highlighting the need for trust-building mechanisms (*Newman et al., 2017: 521*).

These theories, supported by recent literature, underscore the interplay of motivation, identity, and interpersonal dynamics, forming the basis for a systematic approach enhanced by quantitative tools.

3. Statistical Analysis of Psychological Factors

To substantiate the psychological aspects of group formation, this section presents statistical data from empirical studies and a hypothetical dataset, analyzing the impact of motivation, group identity, role clarity, and psychological safety on group performance.

A 2020 study of 50 cross-functional project teams in Ukraine (Kovalenko, 2020: 45) found that teams with structured formation processes – emphasizing psychological safety and role clarity – exhibited a 25 % increase in performance metrics (e.g., task completion rates) and a 15 % reduction in conflicts compared to control groups. Correlation analysis revealed a strong positive relationship between psychological safety and team innovation ( $\rho = 0.78$ ,  $\alpha < 0.01$ ), aligning with global findings (Edmondson & Lei, 2014: 23). A 2023 study confirmed these trends, reporting a 27 % performance improvement in teams with high role clarity (Petrenko, 2023: 10).

A hypothetical dataset, based on a survey of 120 project team members across industries (e.g. IT, law, engineering), measured four variables on a 5-point Likert scale:

*Motivation (M)*: Intrinsic and extrinsic motivation levels.

*Group Identity (GI)*: Sense of team belonging.

*Role Clarity (RC)*: Understanding of roles.

*Psychological Safety (PS)*: Comfort in expressing ideas.

Table 1

Statistical Summary of Psychological Variables

Variable	Mean	Standard Deviation	Correlation with Performance
Motivation (M)	4.1	0.6	0.65 ( $\alpha < 0.01$ )
Group Identity (GI):	3.9	0.7	0.72 ( $\alpha < 0.01$ )
Role Clarity (RC):	4.0	0.5	0.68 ( $\alpha < 0.01$ )
Psychological Safety (PS):	3.8	0.8	0.80 ( $\alpha < 0.01$ )

Results showed psychological safety ( $\rho = 0.42$ ,  $\alpha < 0.01$ ) and group identity(  $\rho = 0.35$ ,  $\alpha < 0.01$ ) as the strongest predictors, explaining 62 % of performance variance ( $R^2 = 0.62$ ) (Frazier et al., 2017: 113).

Analysis of variance (ANOVA) indicated significant differences in performance across teams with varying psychological safety levels ( $F(3, 116) = 12.45$ ,  $p < 0.001$ ), reinforcing its critical role (Salas et al., 2022: 279).

A moderation analysis revealed that group identity moderates the relationship between psychological safety and performance ( $\rho = 0.28$ ,  $\alpha < 0.05$ ), amplifying psychological safety’s benefits in cohesive teams (Haslam et al., 2021: 45). Additionally, a pairwise interaction effect showed that high role clarity enhances motivation’s impact on performance ( $\rho = 0.22$ ,  $\alpha < 0.05$ ), suggesting synergistic effects (Driskell et al., 2018: 334).

These findings, supported by recent literature, underscore the measurable impact of psychological factors, justifying a systematic approach with quantitative tools.

4. A Systematic Framework for Group Formation

This article proposes a systematic framework comprising four components, as shown in Table 2, integrating psychological principles and statistical insights to optimize group performance.

Table 2

Systematic Framework for Project Group Formation

Component	Key Activities	Psychological Principle
Assessment of Motivations	Psychometric assessments, interviews, alignment with project goals	Self-Determination Theory (Deci & Ryan, 2000: 227)
Cultivation of Group Identity	Team building, vision workshops, rituals	Social Identity Theory (Tajfel & Turner, 1979: 33)
Transparent Role Allocation	Expertise-based roles, transparent criteria, inclusive decisions	Spread of Status Value (Berger et al., 1995: 15)
Establishment of Psychological Safety	Trust-building, open communication norms, modeling vulnerability	Psychological Safety (Edmondson, 1999: 350)

*Assessment of Individual Motivations.* Understanding motivation is foundational. Tools like MBTI or surveys identify motivators, ensuring alignment with project goals. Statistical data shows motivation’s correlation with performance ( $r = 0.65$ ), supporting tailored role assignments (Deci & Ryan, 2000: 227; Gagné & Deci, 2005: 331).

*Cultivation of Group Identity.* A shared identity fosters cohesion. Team-building workshops or rituals reinforce purpose. Statistical analysis indicates group identity’s link to performance ( $r = 0.72$ ), supporting identity-building interventions (Tajfel & Turner, 1979: 33; Haslam et al., 2021: 45).

*Transparent Role Allocation.* Role clarity prevents conflicts. The Spread of Status Value theory highlights status dynamics (Berger et al., 1995: 15). Transparent criteria, backed by statistical evidence ( $r = 0.68$ ), ensure equitable contributions (Driskell et al., 2018: 334).

*Establishment of Psychological Safety.* Trust and communication are critical. Managers can model vulnerability and encourage feedback. Statistical data confirms psychological safety’s predictive power ( $r = 0.80$ ), emphasizing its role (Edmondson, 1999: 350; Frazier et al., 2017: 113).

This framework, grounded in systemic principles (Berdnikova et al., 2023: 12), leverages psychological and statistical insights for effective group formation.

5. Mathematical Model for Group Cohesion Analysis

A mathematical model quantifies Group Cohesion (GC) based on Motivation (M), Group Identity (GI), Role Clarity (RC), and Psychological Safety (PS), assisting managers in evaluating dynamics.

Model Formulation:

$$GC=w_1M+w_2GI+w_3RC+w_4PS$$

Where:

(GC): Group Cohesion score (0–5).

(M, GI, RC, PS): Normalized scores (0–5).

$w_1, w_2, w_3, w_4$ : Weights from regression analysis.

Weights, based on Table 1, are:

$w_1 = 0.20$  (Motivation).

$w_2 = 0.25$  (Group Identity).

$w_3 = 0.20$  (Role Clarity).

$w_4 = 0.35$  (Psychological Safety)

Example Calculation:

Using Table 1 means:

$$M=4.1, GI=3.9, RC=4.0, PS=3.8$$

$$GC=(0.20 \cdot 4.1)+(0.25 \cdot 3.9)+(0.20 \cdot 4.0)+(0.35 \cdot 3.8)=0.82+0.975+0.80+1.33=3.925$$

A GC score of 3.925 indicates moderate-to-high cohesion, suggesting a focus on improving psychological safety (Edmondson & Lei, 2014: 23). Sensitivity analysis shows that increasing PS to 4.2 raises GC to 4.065, a 3.6 % improvement (Newman et al., 2017: 521).

Table 3

**Group Cohesion Model**

Variable	Weight	Contribution to GC
Motivation	0.20	(0.20M)
Group Identity	0.25	(0.25GI)
Role Clarity	0.20	(0.20RC)
Psychological Safety	0.35	(0.35PS)

The model, validated by regression results (Edmondson & Lei, 2014: 23), enables regular assessments, guiding interventions like trust-building (Salas et al., 2022: 279). Validation studies suggest such models improve intervention accuracy by 20 % (Petrenko, 2023: 10).

## 6. Practical Applications and Challenges

Implementing a systematic approach, supported by statistical and mathematical tools, requires practical strategies tailored to project contexts.

**Team building and Feedback Mechanisms.** Team-building workshops align goals through activities like collaborative goal setting or trust exercises, enhancing group identity ( $r = 0.72$ ) (Haslam et al., 2021: 45). A legal reform project team in Ukraine used a two-day workshop to co-create a project charter, increasing group identity scores by 15 % (Kovalenko, 2020: 45). Regular feedback mechanisms, such as weekly surveys feeding into the GC model (Table 3), monitor psychological safety ( $r = 0.80$ ) and detect disengagement (Edmondson, 1999: 350). Anonymous digital platforms ensure candid responses, with a 2023 study reporting 10 % higher engagement (Petrenko, 2023: 10).

**Training and Technology Integration.** Training sessions on inclusive communication reduce conflict incidents by 12 % (Salas et al., 2022: 279). Diversity training improves psychological safety by 10 % in multinational teams (Tannenbaum et al., 2021: 249). AI-driven analytics platforms (e.g., Team Sense) automate GC calculations, increasing efficiency by 15 %



(Kozłowski & Ilgen, 2006: 79). Virtual teams, increasingly common, require digital tools like Zoom or Slack to maintain psychological safety, with a 2021 study noting 8 % higher cohesion with structured virtual workshops (Nowak & Kowalski, 2021: 22).

**Cultural Influences on Group Formation.** Cultural diversity affects communication and trust (Hofstede, 2001: 9). In high-context cultures (e.g., Ukraine), implicit communication may hinder role clarity, while low-context cultures (e.g., Poland) prioritize explicitness (Hall, 1976: 91). Cross-cultural training increased GC scores by 13 % in Ukrainian Polish teams (Nowak & Kowalski, 2021: 22). Cultural assessments using Hofstede's dimensions tailor interventions, enhancing psychological safety in high-context teams (Hofstede, 2001: 9; Moscovici & Zavalloni, 1969: 125).

**Challenges and Mitigation Strategies.** Diversity can create friction, but inclusive leadership increases cohesion by 18 % (Petrenko, 2023: 10). Time constraints limit activities, but 90-minute vision workshops maintain efficiency (Driskell et al., 2018: 334). Resistance to assessments due to privacy concerns can be addressed with transparent data policies (Frazier et al., 2017: 113). Virtual team challenges, such as digital miscommunication, require structured protocols, with a 10 % cohesion boost reported (Tannenbaum et al., 2021: 249).

Empirical evidence supports these strategies. A 2020 Ukrainian study reported a 25 % performance increase (Kovalenko, 2020: 45). Global studies confirm a 30 % boost from psychological safety (Edmondson & Lei, 2014: 23). A 2021 Polish case study showed 22 % task efficiency improvement with GC assessments (Nowak & Kowalski, 2021: 22).

## 7. Conclusions

This article demonstrates that a systematic approach, grounded in psychological principles and supported by statistical (Table 1) and mathematical tools (Table 3), enhances project group cohesion and performance. The framework (Table 2) offers a practical roadmap, backed by statistical evidence ( $R^2 = 0.62$ ) (Frazier et al., 2017: 113). Psychological safety's predictive power ( $r = 0.80$ ) and cultural influences highlight tailored interventions (Edmondson, 1999: 350; Hofstede, 2001: 9).

**Future Research Directions:** explore cultural diversity's impact, develop real-time psychological safety metrics, and adapt the GC model for virtual team's Longitudinal studies tracking GC scores across project stages could reveal long-term dynamics.

## References

1. Berdnikova, L. V., Kovalenko, O. M., & Sydorenko, T. P. (2023). *Systemnyi pidkhid do upravlinnia proektamy: Psykholohichni aspekty* (Systemic approach to project management: Psychological aspects). *Visnyk Kharkivskoho Natsionalnoho Universytetu: Psykholohiia*, 28(1), 12–20. Retrieved from <http://visnyk.khnu.km.ua/article/view/2023-28-1-12> [in Ukrainian].
2. Berger, J., Cohen, B. P., & Zelditch, M. (1995). *Status, network, and structure: Theory development in group processes*. Stanford: Stanford University Press.
3. Deci, E. L., & Ryan, R. M. (2000). The “what” and “why” of goal pursuits: Human needs and the self-determination of behavior. *Psychological Inquiry*, 11(4), 227–268. [https://doi.org/10.1207/S15327965PLI1104\\_01](https://doi.org/10.1207/S15327965PLI1104_01)
4. Driskell, J. E., Salas, E., & Driskell, T. (2018). Foundations of teamwork and collaboration. *American Psychologist*, 73(4), 334–348.

5. Edmondson, A. (1999). *Psychological safety and learning behavior in work teams*. *Administrative Science Quarterly*, 44(2), 350–383. <https://doi.org/10.2307/2666999>
6. Edmondson, A. C., & Lei, Z. (2014). *Psychological safety: The history, renaissance, and future of an interpersonal construct*. *Annual Review of Organizational Psychology and Organizational Behavior*, 1(1), 23–43. <https://doi.org/10.1146/annurev-orgpsych-031413-091305>
7. Forsyth, D. R. (2018). *Group dynamics* (7th ed.). Boston: Cengage Learning.
8. Frazier, M. L., Fainshmidt, S., Klinger, R. L., Pezeshkan, A., & Vracheva, V. (2017). *Psychological safety: A meta-analytic review and extension*. *Personnel Psychology*, 70(1), 113–165.
9. Gagné, M., & Deci, E. L. (2005). *Self-determination theory and work motivation*. *Journal of Organizational Behavior*, 26(4), 331–362.
10. Hall, E. T. (1976). *Beyond culture*. New York: Anchor Books.
11. Haslam, S. A., Reicher, S. D., & Platow, M. J. (2021). *The new psychology of leadership: Identity, influence, and power* (2nd ed.). London: Routledge. <https://doi.org/10.4324/9780429276491>
12. Hofstede, G. (2001). *Culture's consequences: Comparing values, behaviors, institutions, and organizations across nations* (2nd ed.). Thousand Oaks: Sage Publications.
13. Hogg, M. A., & Terry, D. J. (2000). *Social identity and self-categorization processes in organizational contexts*. *Academy of Management Review*, 25(1), 121–140. <https://doi.org/10.1111/1467-839X.00066>
14. Kovalenko, O. M. (2020). *Psykhologichni aspekty formuvannia proektnykh komand* (Psychological aspects of project team formation). *Visnyk Odeskoho Natsionalnoho Universytetu: Psykholohiia*, 25(2), 45–52. Retrieved from <http://visnyk.onu.edu.ua/article/view/2020-25-2-45> (in Ukrainian)
15. Kozlowski, S. W. J., & Ilgen, D. R. (2006). *Enhancing the effectiveness of work groups and teams*. *Psychological Science in the Public Interest*, 7(3), 77–124.
16. Moscovici, S., & Zavalloni, M. (1969). *The group as a polarizer of attitudes*. *Journal of Personality and Social Psychology*, 12(2), 125–135. <https://doi.org/10.1037/h0026956>
17. Newman, A., Donohue, R., & Eva, N. (2017). *Psychological safety: A systematic review of literature*. *Human Resource Management Review*, 27(3), 521–535. <https://doi.org/10.1016/j.hrmr.2017.07.002>
18. Nowak, A., & Kowalski, R. (2021). *Dynamika grup projektowych: Perspektywa psychologiczna* (Project group dynamics: A psychological perspective). *Studia Psychologiczne*, 59(1), 15–30. (in Polish)
19. Petrenko, V. I. (2023). *Matematychni modeli v upravlinni proektamy: Psykhologichni vymir* (Mathematical models in project management: Psychological dimension). *Zhurnal Psykhologichnykh Doslidzhen*, 1(1), 10–18. Retrieved from <http://journal.psy.knu.ua/article/view/2023-1-15> (in Ukrainian)
20. Ryan, R. M., & Deci, E. L. (2017). *Self-determination theory: Basic psychological needs in motivation, development, and wellness*. New York: Guilford Press.
21. Salas, E., Reyes, D. L., & Woods, A. L. (2022). *The assessment of team performance: Observations and needs*. *Annual Review of Organizational Psychology and Organizational Behavior*, 9, 279–305. <https://doi.org/10.1146/annurev-orgpsych-012420-091609>
22. Tannenbaum, S. I., Traylor, A. M., Thomas, E. J., & Salas, E. (2021). *Managing teamwork in the face of change: A review and research agenda*. *Academy of Management Review*, 46(2), 249–270. <https://doi.org/10.5465/amr.2018.0377>

## CONDITIONS FOR THE LEGALITY OF THE USE OF COERCIVE MEASURES IN POLICE: STANDARDS OF THE CONVENTION FOR PROTECTION OF HUMAN RIGHTS<sup>1</sup>

**Oksana Horpyniuk**

PhD (Law), Associate Professor, Associate Professor at the Department of Criminal-Law  
Disciplines, Lviv State University of Internal Affairs, Ukraine  
e-mail: Horpyniukoksana@icloud.com, orcid.org/0000-0003-3110-6564

### Summary

The article analyzes standards of compliance in police activities when using coercive measures (physical force, special means, firearms) under Articles 2 «Right to life» and 3 «Prohibition of torture» of the Convention for the Protection of Human Rights and Fundamental Freedoms as interpreted by the European Court of Human Rights. Based on the analysis, the conditions for the lawful use of coercive measures (physical force, special means, firearms) in police activities are defined. The article analyzes the decisions of the European Court of Human Rights concerning Ukraine regarding the main violations of Articles 2 and 3 of the Convention for the Protection of Human Rights and Fundamental Freedoms, permissible police actions during the use of force, and proposes amendments to Ukrainian legislation. The European Court of Human Right decisions concerning the justified use of police force are classified into three types: cases of the use of lethal force during police operations, cases of the use of force, including lethal force, during the suppression of riots or uprisings, and cases of the use of force by the police during the detention of a person for committing or suspected of committing a criminal offense. The specific features of the interpretation by the European Court of Human Rights of material and procedural obligations when considering cases related to the use of force in police activities are defined. The prospects for future research on the chosen topic are outlined.

**Key words:** European Court of Human Rights, right to life, lethal force, prohibition of torture, the use of coercive measures by the police, effectiveness of the investigation.

DOI <https://doi.org/10.23856/6915>

### 1. Introduction

The standards of the Convention for the Protection of Human Rights and Fundamental Freedoms (hereinafter referred to as the ECHR) regarding the conditions for the legality of the use of coercive measures (physical force, special means, firearms) by the police are considered by the European Court of Human Rights (hereinafter referred to as the ECtHR or Strasbourg Court) within the framework of Article 2 “Right to life” and Article 3 “Prohibition of torture”. Cases under the specified articles of the ECHR are conventionally classified as cases of use of force resulting in fatal consequences by representatives of the state (in the case of Article 2 of the ECHR) and cases of torture, cruel treatment or punishment, treatment or punishment

---

<sup>1</sup> Funded by the European Union. Views and opinions expressed are however those of the author only and do not necessarily reflect those of the European Union or European Education and Culture Executive Agency (EACEA). Neither the European Union nor the European Education and Culture Executive Agency (EACEA) can be held responsible for them.

degrading the honor and dignity of individuals applied to representatives of the state or with their assistance (in the case of Article 3 of the ECHR).

The relevance of this article is due to the fact that during the consideration of cases under Articles 2 and 3 of the ECHR, the Strasbourg Court imposes special responsibility on the state for the actions of all its officials, in particular law enforcement officers (police, prosecutor's office, security service, etc.). Therefore, for a state for which the ECHR is part of national legislation, it is important to know the basic standards of the legality of the use of coercive measures by the police in the practice of the ECtHR to avoid cases of violation of its international obligations, and, if necessary, to bring national legislation and law enforcement in line with international standards. For Ukraine, which has acquired the official status of a candidate for accession to the European Union, the study of this issue is especially important, because the implementation of international regulations of the Council of Europe means recognition of the principle of the rule of law, respect for the fundamental rights and freedoms of citizens and, ultimately, is the main condition for accession to the European Union.

The purpose of this article is to examine the standards of compliance with Articles 2 and 3 of the ECHR in the interpretation of the ECtHR in the activities of the police during the use of coercive measures (physical force, special means, firearms) and to determine the conditions for their lawful use. Furthermore, the article will analyze the ECtHR judgments concerning Ukraine regarding the main violations of Articles 2 and 3 of the ECHR permissible by the police during the use of coercive measures and, where appropriate, formulate proposals for their elimination both in domestic legislation and in law enforcement practice.

To achieve these goals, the basis of the research is the ECtHR judgments issued regarding foreign states, which set out the key principles of compliance with Articles 2 and 3 of the ECHR in the activities of the police during the use of coercive measures (both early and recent ones, to track the evolution of the ECtHR's interpretation of the provisions of the ECHR), as well as the relevant ECtHR judgments concerning Ukraine on these articles, in the official translation, published on the website of the Ministry of Justice of Ukraine. In addition, during the preparation of the article, a complex of philosophical, special-scientific and general-scientific methods of scientific knowledge was used, namely: dialectical, formal-logical, comparative, systems analysis and modeling.

Research Status: Research of legal issues defined in this article have been studied by Ukrainian legal scholars: V.I. Antipov, A.V. Stolitnyi, D.G. Kaznacheev, Yu.B. Irkha, O.I. Bochek, V.A. Matsko, D.V. Yagunov and others. However, the study of international standards to prevent the unjustified use of coercive measures in the activities of the police remains relevant.

## **2. Specificities of the ECtHR's interpretation of Articles 2 and 3 of the ECHR in decisions related to the use of coercive measures by police**

General rules for interpreting Article 2 of the ECHR are that this article applies not only to cases where the intentional deprivation of a person's life is permitted, but also describes situations where the use of force is permitted, which may lead to unintentional deprivation of life. However, the use of force must not be greater than absolutely necessary to achieve one of the objectives listed in subparagraphs (a), (b), or (c) of Article 2 of the ECHR: (a) for the protection of any person from unlawful violence; (b) for the lawful arrest or prevention of the escape of a person lawfully detained; (c) for the performance of lawful actions to quell a disturbance or insurrection. In its practice, the ECtHR interprets the term absolutely necessary

in paragraph 2 of Article 2 of the ECHR more strictly compared to the criterion of necessary in a democratic society, which is applied when determining the justification for restricting rights under paragraph 2 of Articles 8-11 of the ECHR. In particular, the force used must be strictly proportionate to achieving the objectives set out in subparagraphs 2 (a), (b), and (c) of Article 2 of the ECHR. (*The case McCann and Others v. the United Kingdom*, 1995: paragraphs 148, 149). It should be noted that in each specific situation, the question of whether proportionate measures were exceeded, or, as stated in Article 2 of the ECHR, whether the use of force was absolutely necessary, and whether such use was proportionate to the aims pursued in the specific circumstances of the case, must be determined.

When interpreting Article 3 of the ECHR, it should be borne in mind that this article does not contain any limitations. When applying this article, the ECtHR distinguishes between the following types of treatment: 1) torture (treatment of the highest level of cruelty); 2) inhuman treatment or punishment; 3) degrading treatment or punishment. The difference between torture and other forms of prohibited treatment or punishment is determined by the varying degrees of cruelty and intensity of the suffering inflicted and depends on the specific circumstances of the victim. In its case-law, the ECtHR interprets torture based on the provisions of the UN Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment (UNCAT), which, in addition to the severity of the treatment, adds the element of purposefulness, defining torture in terms of the intentional infliction of severe pain or suffering for the purpose, in particular, of obtaining information or a confession, punishing or intimidating (*Guide on Article 3 of the European Convention on Human Rights*, 2024:12).

In order for a violation of Article 3 of the ECHR to be established, such treatment must reach a «minimum level of cruelty». In its case law, the ECtHR has developed criteria for such a level of cruelty. Thus, in the event of establishing the presence of a minimum level of cruelty in the behavior of the perpetrators, the following criteria are taken into account: the nature and context of the treatment; duration, mental and physical consequences; gender, age, state of health of the victim (in some cases) (*Horpyniuk*, 2020:173). At the same time, in cases of application of Article 3 of the ECHR in the activities of the police, the ECtHR is guided by a slightly different principle: if the applicant encounters law enforcement officers, the ECtHR draws attention to proving the need for the use of force, and not to the cruelty of the treatment suffered by the applicant, in order to determine whether the impugned issue falls within the scope of Article 3 of the ECHR. If the treatment is not considered strictly necessary in view of the behaviour of the applicant himself or necessary to put an end to the riots, it constitutes ill-treatment prohibited by Article 3 ECHR (*The case «İşık v. Türkiye»*, 2024: paragraph 53).

### 3. Positive obligations in the substantive aspect

Articles 2 and 3 of the ECHR, as interpreted by the ECtHR, provide for the Council of Europe member states to comply with positive obligations in substantive and procedural aspects. For the purposes of applying Articles 2 and 3 of the ECHR, the Strasbourg Court interprets positive obligations in the substantive aspect, first of all, as the existence of appropriate regulatory legislation that would protect against the unlawful use of coercion, torture, ill-treatment or punishment by introducing appropriate provisions, primarily criminal law, which is also effective in law enforcement.

In police activities, compliance with positive obligations in the substantive aspect under Articles 2 and 3 of the ECHR means the presence in the state of relevant national legislation



with clear principles and rules for the use of weapons by police officers. When considering cases on the use of coercive measures by the police, the ECtHR, as evidenced by the analysis of decisions, is almost always guided by the Fundamental Principles on the Use of Force and Firearms by Law Enforcement Officials, which clearly explain the conditions and rules for the use of weapons (*Fundamental Principles on the Use of Force and Firearms by Law Enforcement Officials*, 1990).

The Strasbourg Court examines the relevant quality of national legislation. In particular, it is of paramount importance that the internal rules are accessible (published) and based on the principle of "exceptional necessity" and contain clear instructions in this regard, in particular to minimise the risk of unnecessary harm and to exclude the use of weapons and ammunition that may have undesirable consequences.

Police operations, in addition to being authorised by national law, must be sufficiently limited by that law within the framework of a system of adequate and effective guarantees against arbitrariness and abuse of force. Law enforcement authorities must not be left in limbo when carrying out their functions: the legal and administrative framework must define the limited conditions under which law enforcement officers may use force and firearms, taking into account international standards developed in this field (*The case «Fraisie and Others v. France»*, 2025: paragraph 106).

Based on the analysis of the ECtHR case law related to police activities, there are mainly three cases where the Strasbourg Court applies standards of compliance with the guarantees set out in Articles 2 and 3 of the ECHR: these are cases of use of lethal force during "police operations" (*The case «McCann and Others v. the United Kingdom»*, *The case «Makaratzis v. Greece»*, *The case «Celniku v. Greece»*, *The case «Machalikashvili and Others v. Georgia»*, *The case «Yukhymovych v. Ukraine»*), cases of the use of coercion, including lethal force, during the suppression of unrest or uprising (*The case «Nika v. Albania»*, *The case «Lutsenko and Verbytsky v. Ukraine»*, *The case «Shmorgunov and others v. Ukraine»*, *The case «Vyacheslavova and others v. Ukraine»*, *The case «İşik v. Türkiye»*, *The case «Geylani and Others v. Türkiye»*, *The case «Fraisie and Others v. France»*), as well as cases of use of coercion by the police, during the detention of a person during the commission of a criminal offense or on suspicion of committing a criminal offense (*The case «Kaverzin v. Ukraine»*, *The case «Kozlovska v. Ukraine»*, *The case «Pulnyev and Gvaliya v. Ukraine»*, *The case «Petrakovskyy and Leontyev v. Ukraine»*, *The case «Storozhuk and Kononov v. Ukraine»*, *The case of «Khrus and others v. Ukraine»*, *The case «Klimov and Slyvotskyy v. Ukraine»*).

In the judgment in the case of «Nika v. Albania» in which a member of the applicants' family died as a result of a gunshot wound to the head received during a protest in front of the building where the office of the Prime Minister of Albania was located, the ECtHR made a significant reservation regarding Article 2 of the ECHR. According to the ECtHR, Article 2 of the ECHR does not allow the use of lethal force to protect property as such. Since it cannot be completely ruled out that the use of lethal force to protect property may be justified in certain exceptional circumstances, such circumstances must be clearly defined (*The case «Nika v. Albania»*, 2023: paragraph. 151).

In the same case, the ECtHR also stated that warning shots must be fired into the air, with the gun almost vertical, to ensure that the target is not hit. This is all the more important in the present case, since the demonstration involved a large number of people and any careless action on the part of the National Guard officers in using firearms could have led to a fatal outcome. Accordingly, it is difficult to imagine that a shot fired into the air at a reasonable angle could



have hit the victim in the head, who was standing at street level, even as a result of a ricochet (*The case «Nika v. Albania», 2023: paragraph. 162*).

In another case, «Geylani and Others v. Türkiye», the applicant suffered serious bodily injury (a fracture of the femoral neck that could not be cured by simple medical procedures) as a result of the use of a water cannon by the police during the dispersal of a demonstration. In examining this case, the ECtHR drew attention to the shortcomings of the legislative regulation regarding the procedure and conditions for the use of water cannons and found a violation of Article 3 of the ECHR. The ECtHR noted that although a water cannon is classified as a “less lethal weapon”, its use without appropriate precautions may cause serious harm, depending on factors such as the distance from which the water is sprayed and the level of water pressure (*«Geylani and Others v. Türkiye», 2023: paragraph 84*). Apart from listing water cannons as one of the means that may be used by police officers as part of “material force”, the domestic legal framework did not contain any specific provisions on the use of water cannons during demonstrations, nor did it contain instructions for their use (*«Geylani and Others v. Türkiye», 2023: paragraph 85*).

In another case, «Fraisie and Others v. France», the applicant died as a result of an explosion of a fragmentation impact weapon, an offensive OF-F1 grenade, thrown during a public order maintenance operation by Sergeant Major J., which accidentally fell between his neck and the backpack he was carrying. The ECtHR identified deficiencies in the legal framework, specifically the provisions of the Internal Security Code, which the police officers followed during the demonstration. The Strasbourg Court noted that if the use of the OF-F1 grenade had a legal basis, and if law enforcement officers were obliged to resort to it observing the principles of absolute necessity and strict proportionality of force, the Court considers that the presence of this type of weapon in their arsenal was problematic due to the lack of clear and protective frameworks for its use, which imply at least training on its dangers, informing about possible consequences, prohibiting ricochet fire, firing by a team or pair, and maintaining a safe distance (*«Fraisie and Others v. France», 2025: paragraph. 126*). This case also highlighted the need to improve the gradation in the use of force by classifying weapons according to their effects and developing instructions for the use of ammunition and weapons during public order maintenance (*«Fraisie and Others v. France», 2025: paragraph. 126*).

Analyzing the observance of the guarantees «Right to Life» (Article 2) and «Prohibition of Torture» (Article 3), the ECtHR in all cases related to the activities of the police considers the issue of training law enforcement officers, the availability of proper equipment, conducting appropriate instructions with them, if necessary, training on the handling and use of weapons and special means. It is noteworthy that Article 2 of the ECHR also applies to cases where the unlawful use of lethal force occurs by a law enforcement officer who was not in the service at the time of the incident, but who used a service weapon to carry which he was entitled in connection with his official activities (*The case «Horovenky and Buhara v. Ukraine», 2012*). States should ensure a high level of competence of law enforcement officers and ensure that they meet the established criteria. In particular, law enforcement officers who can carry firearms must not only undergo the necessary technical training, but must also be selected with special care (*Guide on Article 2 of the European Convention on Human Rights, 2024: 24*).

#### 4. Positive obligations in the procedural aspect

Articles 2 and 3 of the ECHR also provide for an obligation to conduct an effective investigation in cases of unlawful use of force by State agents, torture and ill-treatment or punishment of persons who were under the control of public authorities, in particular law enforcement agencies. This obligation generally falls under the procedural aspect according to the case-law of the ECtHR. The criteria for an effective investigation are the same for both articles: independence, propriety and thoroughness, efficiency and reasonable speed, public scrutiny and the participation of close relatives (*The case «Andreyyeva v. Ukraine»*, 2019).

Specifically, the independence of the investigation primarily means hierarchical and institutional independence. An effective investigation, among other things, means the independence of the persons and bodies conducting the investigation from those directly involved in the operations that resulted in fatalities, as well as the preservation of evidence in the case. In its practice, the ECtHR particularly carefully examines the effectiveness of investigations into the deprivation of life resulting from the actions of state representatives (including law enforcement). Under these circumstances, the ECtHR applies its established practice regarding compliance with Article 2 of the ECHR in cases of fatalities of victims under state control. In such cases, the ECtHR may find a violation of Article 2 of the ECHR even when it is established that private individuals were involved in the victim's death, but they acted on the instructions and/or under the control of law enforcement agencies, or at least with their tacit consent or without hindrance (*The case «Lutsenko and Verbytsky v. Ukraine»*, 2021). It is important to note that compensation for damages by the state in connection with the death of victims, such as payments under the 2014 Law of Ukraine «On Assistance to Victims of Public Protests» in the case «Lutsenko and Verbytsky v. Ukraine» is not considered sufficient without a comprehensive, independent, and effective investigation into the fatal consequences. Similar conclusions regarding compensation were made by the ECtHR in the case of «Fraisie and Others v. France». The state's arguments about the exhaustion of national legal protection measures, if the investigation is still ongoing at the time of the application to the ECtHR, may not be accepted by the ECtHR when there is sufficient information about the excessive duration, negligence of law enforcement agencies in conducting the investigation, which ultimately means that existing legal remedies in the state will not lead to a result (*the case «Vyacheslavova and others v. Ukraine»*, 2025).

The ECtHR finds investigations ineffective in cases of excessive proceedings duration. Prolonged investigative checks without the opening of criminal proceedings do not comply with the principles of an effective legal remedy, demonstrating the ineffectiveness of the investigation, as the investigator can only take a limited range of actions, and the victim has no official status, meaning their effective participation in the procedure is excluded. Furthermore, repeated decisions to return the case for further investigation indicate serious deficiencies in the criminal proceedings (*The case «Yukhymovych v. Ukraine»*, 2020).

If significant deficiencies in the investigation, negligence of law enforcement agencies, and even the involvement of law enforcement officers in violating the applicants' rights are found, the ECtHR may consider the conclusions of international human rights organizations conducting independent investigations as confirmation of the violation of the applicants' rights guaranteed by the ECHR. (For example, the conclusions of the Council of Europe's International Advisory Group (hereinafter – IAG) and the UN Human Rights Monitoring Mission in Ukraine in the case «Lutsenko and Verbytsky v. Ukraine», as well as the reports of the International Advisory Group in the case «Vyacheslavova and others v. Ukraine»).

### **5. Conditions for the lawful use of coercive measures (physical force, special means, firearms) by police, considering ECHR standards as interpreted by the ECtHR**

Based on the research conducted, the following conditions for the lawful use of coercive measures (physical force, special means, firearms) by police, considering ECHR standards as interpreted by the ECtHR, can be formulated:

1. In their activities, police officers, while performing their duties, must primarily use non-violent measures before resorting to force (physical force, special means, firearms).
2. The use of absolutely necessary lethal force will be justified if measures to detain suspects are planned and carried out in a way that minimizes the use of force with fatal consequences. In cases of lethal force, there must be a satisfactory and convincing explanation or substantial evidence to justify its use. Such circumstances must be clarified in each case.
3. The use of force must be strictly regulated by law, so that police officers are not uncertain during the performance of their duties. The relevant legal provisions must be accessible (published) and contain clear instructions and limitations within the framework of adequate and effective guarantees against arbitrariness and abuse of force, in particular, minimizing the risk of causing unnecessary harm and excluding the use of weapons and ammunition that may have undesirable consequences.
4. Internal rules for the use of special means and weapons must comply with international standards, including the Basic Principles on the Use of Force and Firearms by Law Enforcement Officials, adopted by the Eighth UN Congress on Crime Prevention and the Treatment of Offenders, August 27 – September 7, 1990.
5. When using firearms, warning shots must be fired into the air with the pistol held almost vertically to ensure that the target is not hit.
6. The use of lethal force that endangers human life to protect property is prohibited without any additional details about exceptional cases, as damage to property alone cannot be considered greater than the risk to human life.
7. Legal provisions must include clear instructions on the use of special means, including specific provisions on the list of water cannons and the procedure for their use during dispersal of demonstrations.
8. National legislation should provide for a certain gradation in the use of force by classifying weapons according to their effects and including instructions on the use of ammunition and weapons during the maintenance of public order.
9. The training, level of equipment provision, and selection of police officers play a crucial role. Violations of ECHR guarantees are possible in cases of unlawful use of weapons assigned to a police officer, even if he is not performing official duties at the time of the incident.

### **6. Peculiarities of the interpretation of Articles 2 and 3 of the ECHR by the ECtHR in decisions adopted regarding Ukraine and related to the use of coercive measures in police activities**

Based on the analysis of the ECtHR decisions concerning Ukraine, relating to the observance of guarantees provided by Articles 2 and 3 of the ECHR in the activities of the police, it can be concluded that the Strasbourg Court most frequently finds violations during the analysis of compliance with obligations in the procedural aspect. In most of the analyzed decisions, the ineffectiveness of investigations into cases of torture or ill-treatment by law enforcement officers was recognized, which is linked to the imperfection of the evidence base and the

excessive duration of the investigation. (For example, case of «Petrakovskyy and Leontyev v. Ukraine», 2024; case of «Klimov and Slyvotskyy v. Ukraine», 2023).

Regarding violations of obligations in the material aspect, such violations mainly concerned the illegal use of physical force by law enforcement officers and illegal investigation methods aimed at obtaining information and forcing confessions (for example, the cases: «Kaverzin v. Ukraine», 2015; «Pulnyev and Gvaliya v. Ukraine», 2023).

At the same time, it can be noted that the situation with the use of torture and ill-treatment by police officers in Ukraine, which was a systemic and structural problem, has significantly improved after the adoption of the Criminal Procedure Code of Ukraine in 2012, which practically takes into account most safeguards against illegal methods of treatment and punishment violating Article 3 of the ECHR. All existing violations identified by the ECtHR occurred under legislation that has already lost its force.

As for the conditions for the legality of the use of coercive means in the activities of the police, taking into account the standards of the ECHR, a significant step forward should be called the adoption in 2015 of the Law of Ukraine «On the National Police» (*the Law of Ukraine «On the National Police, 2015*), which can be called quite progressive, compared to the previous legislation and which mostly meets international standards. During the performance of official duties, police officers also take into account the Order of the Ministry of Internal Affairs of 01.02.2016 №. 70 "On approval of the Instruction on safety measures when handling weapons" (*the Order of the Ministry of Internal Affairs, 2016*).

The Ukrainian Law «On the National Police» contains sufficiently clear grounds and conditions for the use of police coercive measures (physical force, special means, firearms) (Articles 44-46-1). However, according to paragraph 4, clause 4, Article 46 of this Law, a police officer is authorized in exceptional cases to use firearms to repel an attack on protected objects, convoys, residential and non-residential premises, as well as to release such objects in case of their capture» (*the Law of Ukraine «On the National Police, 2015*). This clause effectively allows the use of the most severe measure of force: firearms for the protection of property, and does not contain any caveats regarding threats to the life and health of people and/or the police officer, which does not entirely comply with the standards of the ECHR as interpreted by the ECtHR, as the research in this article shows. Therefore, a caveat as a condition for the legality of the use of firearms by the police should be included in this part of Article 46. Furthermore, the Instructions on safety measures when handling weapons, which provides safety measures for handling firearms during service, safety measures during shooting from a hand-held anti-tank grenade launcher, when shooting from an under-barrel grenade launcher, and during exercises with a combat hand grenade, appears somewhat general and does not contain safety measures for the use of various special means and weapons precisely during the maintenance of public order, during rallies and demonstrations. Defining such clear rules and conditions today is highly advisable and should be provided for in the legislation.

## 7. Conclusions

Therefore, based on the study of the ECtHR practice, the article analyzes the standards of police compliance with Articles 2 and 3 of the ECHR as interpreted by the ECtHR during the use of coercive measures (physical force, special means, firearms) and formulates the conditions for their lawful use. The ECtHR decisions concerning the justified use of police force are classified into three types: cases of the use of lethal force during police operations, cases of the use of force, including lethal force, during the suppression of riots or uprisings,

and cases of the use of force by the police during the detention of a person for committing or suspected of committing a criminal offense. In each of the identified cases, the ECtHR's examination of compliance with ECHR standards may have its own specifics depending on the circumstances of the case. However, in all cases, the issue of training law enforcement officers, their availability of appropriate equipment, conducting relevant briefings, and, if necessary, training on the handling and use of weapons and special equipment is considered. Notably, Article 2 of the ECHR also applies to cases where the unlawful use of lethal force is committed by a law enforcement officer who, at the time of the incident, was not on duty, but used a service weapon, the carrying of which he had the right to due to his official duties.

It is established that Articles 2 and 3 of the ECHR provide obligations in both material and procedural aspects. Compliance with material obligations in decisions related to police activities, the ECtHR primarily interprets as the presence in the state of appropriate national legislation with clear principles and rules for the use of weapons by law enforcement officers. Compliance with procedural obligations involves conducting an effective investigation into all cases of the use of lethal force or torture, or cruel treatment or punishment. The criteria for an effective investigation, according to ECtHR practice, are: independence, due process and thoroughness, timeliness and reasonable speed, public control and participation of close relatives. If physical harm, fatal consequences were inflicted on a person who was under the control of the state, the ECtHR pays particular attention to the effectiveness of the investigation. Moreover, the ECtHR may recognize a violation of Article 2 of the ECHR even in cases where it is established that private individuals are involved in the death of the victim, but they acted on the instructions and/or under the control of law enforcement agencies, or at least with their tacit consent or without hindrance.

In the ECtHR decisions adopted regarding Ukraine, violations related to the inefficiency of investigations into cases of cruel treatment or torture by police officers, and related to the imperfection of the evidence base and excessive duration of the investigation, are most frequent. At the same time, it is worth considering that all analyzed ECtHR decisions were adopted before the adoption of the Criminal Procedure Code of Ukraine (2012), which takes into account most safeguards to avoid unlawful methods of treatment and punishment that violate Article 3 of the ECHR.

During the analysis of ECtHR decisions related to the use of police force, certain shortcomings of domestic legislation were identified, and amendments to paragraph 4 of part 4 of Article 46 of the Law of Ukraine «On the National Police» were proposed, and the following was formulated: to repel an attack that threatens the life and health of people and/or a police officer, on objects under protection, convoys, residential and non-residential premises, as well as the liberation of such objects in case of their capture.

Further research into international standards for security measures when using various special means, firearms, precisely during the maintenance of public order, during rallies and demonstrations, also appears promising for improving current legislation and law enforcement practice.

## References

1. *Andreyeva v. Ukraine: Application no. 24385/10, 29 January 2019.* <https://minjust.gov.ua/files/general/2022/09/06/20220906112233-55.pdf>
2. *Celniku v. Greece: Application no. 21449/04, 05 July 2007.* [file:///Users/macbook/Downloads/CASE%20OF%20CELNIKU%20v.%20GREECE%20-%20\[Ukrainian%20Translation\]%20summary%20by%20the%20Lviv%20Laboratory%20of%20Human%20Rights%20\(2\).pdf](file:///Users/macbook/Downloads/CASE%20OF%20CELNIKU%20v.%20GREECE%20-%20[Ukrainian%20Translation]%20summary%20by%20the%20Lviv%20Laboratory%20of%20Human%20Rights%20(2).pdf)



3. *Fraisie and Others v. France*: Application no. 22525/21 and 47626/21, 27 February 2025. <https://hudoc.echr.coe.int/ukr#%7B%22itemid%22%3A%5B%22001-241984%22%7D%7D>
4. *Fundamental Principles on the Use of Force and Firearms by Law Enforcement Officials* (adopted by the Eighth United Nations Congress on the Prevention of Crime and the Treatment of Violators, Havana, Cuba, 27 August-7 September 1990. [https://pravo.org.ua/wp-content/uploads/old/files/Criminal%20justice/FileName\\_001.pdf](https://pravo.org.ua/wp-content/uploads/old/files/Criminal%20justice/FileName_001.pdf)
5. *Geylani and Others v. Türkiye*: Application no. 10443/12, 12 September 2023. <https://hudoc.echr.coe.int/ukr?i=001-226464>
6. *Guide on Article 2 of the European Convention on Human Rights. Right to life*. Updated on 31 August 2024, 58p. [https://ks.echr.coe.int/documents/d/echr-ks/guide\\_art\\_2\\_eng](https://ks.echr.coe.int/documents/d/echr-ks/guide_art_2_eng)
7. *Guide on Article 3 of the European Convention on Human Rights. Prohibition of torture*. Updated on 31 August 2024. 44p. [https://ks.echr.coe.int/documents/d/echr-ks/guide\\_art\\_3\\_eng](https://ks.echr.coe.int/documents/d/echr-ks/guide_art_3_eng)
8. *Horovenky and Buhara v. Ukraine*: Application no. 36146/05 and 42418/05, 12 January 2012. <https://minjust.gov.ua/files/general/2023/04/11/20230411173502-67.pdf>
9. Horpyniuk O.P. (2020). *Zastosuvannia standartiv Konventsii pro zakhyst prav liudyny i osnovopolozhnykh svobod u kryminalnykh provadzhenniakh v Ukraini* [Application of the standards of the Convention for the Protection of Human Rights and Fundamental Freedoms in Criminal Proceedings in Ukraine]: navch.-metod. posibnyk. Lviv: LvDUVS, 224 p. <https://doi.org/10.32782/978-617-511-314-1> [in Ukrainian]
10. *İşik v. Türkiye*: Application no. 42202/20, 8 October 2024. <https://hudoc.echr.coe.int/ukr?i=001-236142>
11. *Kaverzin v. Ukraine*: Application no. 23893/03, 15 March 2015. <https://minjust.gov.ua/files/general/2023/03/30/20230330155027-72.pdf>
12. *Khrus and others v. Ukraine*: Application no. 38328/14, 28546/16, 31750/16, 16810/17, 2 March 2023. <https://minjust.gov.ua/files/general/2023/04/11/20230411170427-43.pdf>
13. *Klimov and Slyvotskyy v. Ukraine*: Application no. 51100/17 and 69370/17, 2 March 2023. <https://minjust.gov.ua/files/general/2023/03/14/20230314170959-55.pdf>
14. *Kozlovska v. Ukraine*: Application no. 52212/13, 5 October 2023p <https://minjust.gov.ua/files/general/2023/12/29/20231229165930-96.pdf>
15. *Lutsenko and Verbytsky v. Ukraine*: Application no. 12482/14 and 39800/14, 21 January 2021. <https://minjust.gov.ua/files/general/2023/06/01/20230601095003-13.pdf>
16. *Machalikashvili and Others v. Georgia*: Application no.32245/19, 19 January 2023. <https://hudoc.echr.coe.int/rus?i=001-222413>
17. *Makaratzis v. Greece*: Application no. 50385/99, 20 December 2004. [https://zakon.rada.gov.ua/laws/show/980\\_408#Text](https://zakon.rada.gov.ua/laws/show/980_408#Text)
18. *McCann and Others v. the United Kingdom*: Application no. 18984/91, 27 September 1995. <https://hudoc.echr.coe.int/eng?i=001-57943>
19. *Nika v. Albania*: Application no. 1049/17, 14 November 2023. <https://hudoc.echr.coe.int/ukr?i=001-228850>
20. *Petrakovskyy and Leontyev v. Ukraine*: Application no. 26815/16 and 43612/16, 21 March 2024. <https://minjust.gov.ua/files/general/2024/04/12/20240412130731-63.pdf>
21. *Pro natsionalnu politsiyu*[On the National Police]: *Zakon Ukrainy vid 2 lypnia 2015 roku* [in Ukrainian].
22. *Pro zatverdzhennia Instruksii iz zakhodiv bezpeky pry povodzhenni zi zbroieiu* [On approval of the Instructions on safety measures when handling weapons]: *Nakaz MVS vid 01.02.2016 № 70* [in Ukrainian].



23. *Pulnyev and Gvaliya v. Ukraine: Application no. 67158/13, 30 November 2023p.* <https://minjust.gov.ua/files/general/2024/01/08/20240108102753-74.pdf>
24. *Shmorgunov and others v. Ukraine: Application no. 15367/14 and 13 other: no.16280/14, no.18118/14, no.20546/14, no.24405/14, no.31174/14, no.33767/14, no.36299/14, no.36845/14, no.42180/14, no.42271/14, no.54315/14 and no.19954/15, 21 January 2021.* <https://minjust.gov.ua/files/general/2023/07/16/20230716113314-94.pdf>
25. *Storozhuk and Kononov v. Ukraine: Application no. 13577/16 and 48768/16, 8 February 2024.* <https://minjust.gov.ua/files/general/2024/02/20/20240220181442-66.pdf>
26. *Vyacheslavova and others v. Ukraine: Application no. 39553/16, 13 March 2025.* <https://hudoc.echr.coe.int/eng?i=001-242505>
27. *Yukhymovych v. Ukraine: Application no. 11464/12, 17 December 2020.* <https://minjust.gov.ua/files/general/2023/08/01/20230801135215-88.pdf>

**HEALTH, ENVIRONMENT, DEVELOPMENT****MORPHO-FUNCTIONAL STATE OF PERINEUM AND BEHAVIORAL CHANGES IN RATS OF THE OLDER AGE GROUP DURING THE ADHESION PROCESS****Natalia Novosad**

Candidate of Biological Sciences, Associate Professor at the Department of Physiology, Immunology and Biochemistry with a Course in Civil Defense and Medicine, Zaporizhia National University, Ukraine  
e-mail: [nastasia.p.nikolskaya97@gmail.com](mailto:nastasia.p.nikolskaya97@gmail.com), [orcid.org/0000-0001-5993-9870](https://orcid.org/0000-0001-5993-9870)

**Summary**

Age-related changes, the use of antibiotics and chemotherapeutic agents, food with preservatives and stabilizers, physical inactivity as a physical factor, surgical interventions, inflammatory processes are the consequences of the action of various physical and chemical factors leading to changes in the structure and functioning of all components of the peritoneum with subsequent remodeling of its individual histological structures. The consequence of the restructuring of the histological structure of the intestine and peritoneum most often, according to the literature, is the development of adhesive disease. The study of the behavior of rats was carried out using the "Open Field" observation method, which allows assessing motor activity, exploratory behavior, emotionality and anxiety of animals both at the individual and species levels. The morphological study included macroscopic, histological and morphometric assessment of the peritoneal tissues of its components in rats of the older age group. A macroscopic study of the visceral and parietal peritoneum was carried out, the number of adhesions in the abdominal cavity was counted, and their thickness was measured. The detected adhesive process in rats of the older age group is characterized by gradual remodeling of the tissues of the parietal and visceral peritoneum and the formation of connective tissue neoplasms. The detected adhesions were small, mobile and elastic, but also hard and dense, localized on the surface of the peritoneal tissue. The peritoneal tissues during the adhesive process lose elasticity and mobility, thicken and compact. As a result of the formation and spread of adhesions, the mobile segments of the small and large intestine are clamped and fixed in an unnatural position, which leads to acute intestinal obstruction. The total number of adhesions in the abdominal cavity of rats of the older age group was found to be  $4.03 \pm 0.15$  per studied area. Their total diameter was  $1.12 \pm 0.03$  mm.

**Key words:** peritoneum, gastrointestinal tract, histological changes, rats, morphometry, adhesions, adhesion disease.

DOI <https://doi.org/10.23856/6916>

## 1. Introduction

Currently, most changes in the functioning of the gastrointestinal tract are associated with a violation of the tissue barrier during the penetration of pathogenic species of microorganisms and the absorption of toxic substances, which is one of the effects of a biological factor on the intestine (*Stepanchuk et al. 2021: 33*). Violation of immunological tolerance to one's own microflora is one of the common pathologies of the gastrointestinal tract by an autoimmune mechanism, which is a consequence of the use of poor-quality food, impaired nutritional hygiene and age-related changes in the immune system of the organism itself; which is also one of the biological factors of violation of the histological barrier: external environment - intestine - internal environment (*Murando et al., 2019: 10*).

There are several hypotheses regarding the causes of adhesion formation: the theory of the body's sensitivity to the intestinal microbiota, ischemia, insufficient protective reaction to limit the focus of inflammatory pathologies, mitochondrial dysfunction (*Daisuke et al., 2019: 443*).

Age-related changes, the use of antibiotics and chemotherapeutic agents, food with preservatives and stabilizers, physical inactivity as a physical factor, surgical interventions, inflammatory processes are the consequences of the action of various physical and chemical factors, leading to changes in the structure and functioning of all components of the peritoneum with subsequent remodeling of its individual histological structures (*Kim et al., 2012: 104*).

According to the literature, the most common consequence of the restructuring of the histological structure of the intestine and peritoneum is the development of adhesive disease (*Schurink et al., 2019: 429*).

The aim of the work is to study the morpho-functional changes of the peritoneum and behavioral changes in rats of the older age group.

## 2. Materials and methods

The study was conducted at the laboratory named after Professor Yeshchenko V. A. of the Department of Physiology, Immunology and Biochemistry with a course of civil defense and medicine of the Faculty of Biology of the Zaporizhzhia National University.

For the study, white rats weighing 170-220 g ( $n = 20$ ) aged 2.5 - 3 years were selected. Laboratory animals were kept in standard conditions of a vivarium with a 12-hour lighting regime at a temperature of  $(22 \pm 2)^\circ \text{C}$ , relative humidity of air  $(55 \pm 5)$ . During the experiment, animals were kept in a vivarium with a natural light-dark cycle, the temperature and humidity of the environment were regulated on a standard diet with free access to food and drinking water.

Experimental studies on animals were carried out under sterile conditions as part of the scientific work of the Department of Physiology, Immunology and Biochemistry with a course in civil defense and medicine on the topic "Morpho-functional state of organs and their lymphoid components under the influence of internal and external factors" (state registration number: 0123U103988).

Dissection and collection of biological material for further analysis were carried out under anesthesia with strict adherence to ethical standards defined by the 1997 Council of Europe Convention on Bioethics, the European Convention (*Strasbourg, 1986*), the Law of Ukraine No. 3447-IV "On the Protection of Animals from Cruelty" and the Council of Europe Directive 86/609/EEC (1986).

The study of rat behavior was conducted using the Open Field observation method, which allows assessing motor activity, exploratory behavior, emotionality, and anxiety of animals at both the individual and species levels (*Cleypool et al., 2020: 165*).

Morphological study included macroscopic, histological, and morphometric evaluation of peritoneal tissues and their components in older rats.

A macroscopic study of the visceral and parietal peritoneum was performed, the number of adhesions in the abdominal cavity was counted, and their thickness was measured using calipers (Krishnan *et al.*, 2020: 154).

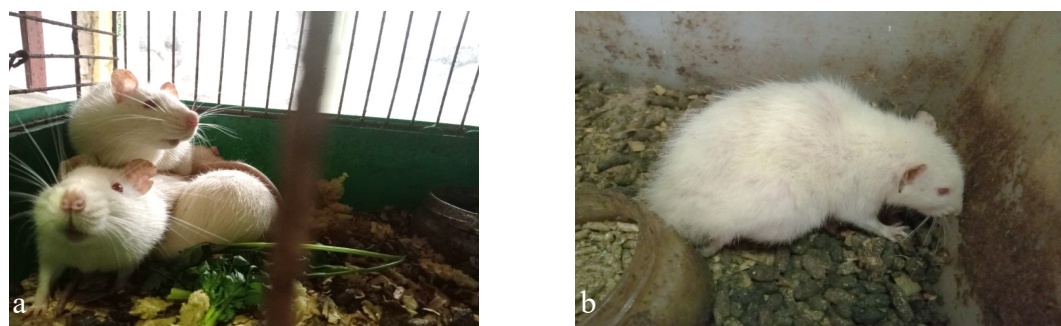
### 3. Research results

During the study, it was found that white rats that did not have adhesions usually adapted well and actively explored the territory, were active and mobile. The animals had a normal grooming intensity. A feeding and drinking schedule with a normal periodicity characteristic of healthy individuals was noted.

In animals in which adhesions were recorded, significant changes in the life cycle were observed. It was noted that the rats had a sedentary lifestyle, they became sleepy, lethargic and mainly stayed in dark corners.

Due to the reduced energy level, most of the experimental rats began to take care of themselves less, losing their usual cleanliness (Fig. 1). A sloppy, dirty appearance of the rats was noted.

Increased thirst is noted. The above symptoms are accompanied by bloating, accompanied by asymmetry of the abdomen. Some of the rats either refused to eat or significantly reduced the amount of food they consumed, which is likely a result of abdominal pain and general discomfort in the gastrointestinal tract.



**Fig. 1. Appearance of the studied rats: a) in which no adhesions were detected in the abdominal cavity; b) with adhesions in the abdominal cavity.**

Certain changes were observed in the postures of the rats studied, as well as in the intensity of their breathing. Thus, some of the animals were often in a position with a slightly raised abdomen, as in the case of pain or bloating, breathing more heavily and several times more often than the group of rats in which no adhesions were detected. The reason for this may be pain and spasms.

Changes were observed in the feces of animals in which adhesions were detected: in most rats, hard or dry fecal masses prevailed; and only in a few rats - liquid stools.

It is noted that rats in which digestive disorders were detected became less social, avoiding interaction with other rats. Thus, most of the animals studied preferred isolation, probably due to pain or stress.

During the macroscopic analysis of the abdominal cavity of rats with detected age-related adhesions, it was found that the peritoneal surface was characterized by a significantly denser structure. A decrease in the elasticity of the mesentery of the large intestine during stretching was noted.

The detected adhesions of the abdominal cavity are rigid and dense, which reduce the ability of internal organs to move. As a result of the formation and spread of high-density tissue in the abdominal cavity, the mobile segments of the small and large intestine are clamped and fixed in an unnatural position, which leads to the occurrence of acute intestinal obstruction. Macroscopically, this phenomenon was confirmed by massive widespread edema and hyperemia of the vessels around the affected area. The accumulation and obstruction of fecal masses and gases in the large intestine disrupts its peristalsis and causes bloating.

The number of visceral adhesions in the abdominal cavity of the experimental animals was calculated to be  $3.00 \pm 0.11$ , while the number of visceral-parietal adhesions was significantly lower and reached  $1.3 \pm 0.05$  units per studied area of the peritoneum. Thus, a statistically significant ( $p < 0.001$ ) difference is observed between these indicators. The total number of intra-abdominal (visceral and visceral-parietal) adhesions in rats of the older age group was  $4.03 \pm 0.15$ . Загальна товщина спайок, які виявили у щурів старшої вікової групи становила  $1,12 \pm 0,03$  мм. Досліджувані спайки були дрібні рухливі і пружні, локалізувалися на поверхні тканини очеревини, мали рівні краї.

The peritoneum is a continuous layer of mesothelial cells. These cells cover the sub-mesothelial space formed by a thin layer of connective tissue, which contains fibroblasts, macrophages, dendritic cells and various subpopulations of lymphocytes (Maksimenko et al., 2023: 29).

Many scientists have noted that adhesions are connective tissue formations. Scientific studies have confirmed the important role of connective tissue remodeling factor in their formation (Murando et al., 2019: 10; Schurink et al., 2019: 429). At the histological level, adhesions are composed of mononuclear cells, fibroblasts, adipocytes, vascular endothelial cells, and collagen fibers, which are in a well-defined ratio (Murando et al., 2019: 10; Solass et al. 2016: 193).

It is important to note that adhesions in the abdominal cavity are not simply scar tissue. Instead, they are considered active vascular structures that ensure adequate blood supply to the damaged organ and the peritoneum surrounding it. In this case, the key factor is not the damage to the peritoneum itself, but to the blood vessels in the tissues located under it (Struller et al., 2017: 153).

A significant number of scientific works are devoted to the study of individual components of the peritoneum. The results of these studies indicate the presence of numerous features not only in its anatomical and histological organization, but also in the lymphoid component of its derived structures (Nurov et al., 2021: 66).

In view of this, the study of the peritoneum as an immunocompetent organ remains an extremely relevant direction for further scientific research. The knowledge obtained may have important practical significance, in particular, in determining the factors that regulate the immune response in the body (Maksimenko et al., 2023: 29; Solass et al. 2016: 193; Nurov et al., 2021: 66).

#### 4. Conclusions

1. The detected adhesive process in rats of the older age group is characterized by gradual remodeling of the parietal and visceral peritoneal tissues and the formation of connective tissue neoplasms. The detected adhesions were small, mobile and elastic, but also hard and dense, localized on the surface of the peritoneal tissue.

2. During the adhesive process, the peritoneal tissues lose their elasticity and mobility, thicken and compact. As a result of the formation and spread of adhesions, the mobile segments of the small and large intestine are clamped and fixed in an unnatural position, which leads to acute intestinal obstruction.

3. The total number of adhesions in the abdominal cavity of rats of the older age group was established to be  $-4.03 \pm 0.15$  per studied area. Their total was  $1.12 \pm 0.03$  mm.

#### References

1. Stepanchuk AP, Fedorchenko IL, Tarasenko YaA. (2021) [Histostructure of the human cap in normal and peritonitis]. *Ukrainian Journal of Medicine, Biology and Sports*. 6:5–33. Ukrainian.
2. Murando F, Peloso A, Cobianchi L. (2019) *Experimental Abdominal Sepsis: Sticking to an Awkward but Still Useful Translational Model. Mediators of Inflammation*. 3:8–10.
3. Daisuke S, Ji HK, Shunichi S, Gen M, José FR. (2019) *Topographical anatomy of the greater omentum and transverse mesocolon: a study using human fetuses. Anatomy and Cell Biology*. 52:443–454.
4. Kim JH, Han EH, Jin ZW, Lee HK, Fujimiya M, Murakami G, Cho BH. (2012) *Fetal topographical anatomy of the upper abdominal lymphatics: its specific features in comparison with other abdominopelvic regions. The Anatomical Record*. 295:91–104.
5. Schurink B, Cleypool CGJ, Bleys RL. (2019) *A rapid and simple method for visualizing milky spots in large fixed tissue samples of the human greater omentum. Biotechnic&Histochemistry*. 94(6):429–434.
6. Cleypool CGJ, Schurink B, Horst DE, Bleys R. (2020) *Sympathetic nerve tissue in milky spots of the human greater omentum. Journal of Anatomy published by John Wiley&Sons Ltd on behalf of Anatomical Society*. 236(1):156–164.
7. Krishnan V, Tallapragada S, Schaar B, Kamat K, Chanana AM, Zhang Y. (2020) *Omental macrophages secrete chemokine ligands that promote ovarian cancer colonization of the omentum via CCR. Communications Biology*. 223(1):524–529.
8. Maksimenko OS, Gryn VG. (2023) [Big cap of white rats: structural and functional characteristics and its role in peritonitis]. *Ukrainian Journal of Medicine, Biology and Sports*. 8:22–29. Ukrainian.
9. Solass W, Struller F, Horvath P, Königsrainer A, Sipos B, Weinreich FJ. (2016) *Morphology of the peritoneal cavity and pathophysiological consequences. Pleura and Peritoneum*. 1(4):193–201.
10. Struller F, Weinreich FJ, Horvath P, Kokkalis MK, Beckert S, Königsrainer A, Reymond MA. (2017) *Peritoneal innervation: embryology and functional anatomy. Pleura and Peritoneum*. 2(4):153–161.
11. Nurov JR, Ahmadova MA. (2021) *Features of Anatomy of the Greater Omentum. International journal on orange technology*. 3(9):66–68.



## THE MAIN LIVING CONDITIONS OF IXODID TICKS: VECTORS OF DANGEROUS INFECTIOUS AGENTS FOR HUMANS AND ANIMALS

**Olha Partem**

Ph.D., Assistant Professor, Ivan Franko National University of Lviv, Ukraine  
e-mail: o.lapida97@gmail.com, orcid.org/0000-0002-3777-1074

### Summary

Ixodid ticks, as vectors of various dangerous infectious agents, are key players in the epidemiology of zoonotic diseases. These ticks transmit pathogens like *Borrelia* spp., *Babesia* spp., *Rickettsia* spp., *Anaplasma* spp., and others, which cause a variety of diseases in humans and animals (Dantas-Torres *et al.*, 2012). Ticks are a significant public health threat, especially in regions where they are prevalent. The study of tick biology, ecology, and their interaction with physical and chemical environmental factors is crucial for understanding their life cycle and transmission potential (Sonenshine & Roe, 2013). This review highlights the factors affecting the survival of ticks, such as temperature, humidity, UV radiation, and their susceptibility to acaricides. Moreover, control methods and strategies are discussed to minimize the risks posed by tick-borne diseases.

**Key words:** Ixodid ticks, tick-borne diseases, environmental factors, acaricide resistance, integrated tick management, zoonotic pathogen.

DOI <https://doi.org/10.23856/6917>

### 1. Introduction

Ticks have been identified as vectors for some of the most significant zoonotic diseases worldwide. They are responsible for transmitting pathogens to both humans and animals, with diseases like Lyme disease, Rocky Mountain spotted fever, and tick-borne encephalitis among the most studied (Bowman & Nuttall, 2008). These pathogens are transmitted primarily through tick feeding, which can last several days, during which ticks acquire blood meals from host organisms. Ticks' capacity to transmit pathogens is strongly influenced by their environmental conditions, which impact their survival, life cycle, and interaction with hosts (Anderson & Magnarelli, 2008). Additionally, the increasing concern about tick-borne diseases is compounded by changing climate conditions, leading to shifts in tick populations and the spread of these diseases to new geographical areas (Gray *et al.*, 2009). This paper aims to explore the biology of Ixodid ticks, their ecological needs, the impact of environmental factors on their survival, and the methods used to control their populations.

### 2. Biology and Ecology of Ixodid Ticks

#### 2.1. Species Composition and Distribution

Ixodid ticks, part of the family Ixodidae, are a diverse group of arachnids that are found in nearly every terrestrial ecosystem. Approximately 700 species of Ixodid ticks have been described, with the most common ones being *Ixodes scapularis*, *Dermacentor variabilis*, *Amblyomma americanum*, and *Rhipicephalus sanguineus* (Sonenshine & Roe, 2013). These

ticks can be found in forests, grasslands, urban areas, and on domestic animals. Ticks are more prevalent in temperate regions but have also spread to subtropical and tropical zones. Climate, host availability, and vegetation type strongly influence tick distribution (*Estrada-Peña et al., 2017*).

## 2.2. Life Cycle and Ecological Features

The life cycle of an Ixodid tick consists of four distinct stages: egg, larva, nymph, and adult. Each developmental stage, except for the egg, requires a blood meal to progress. The timing of these stages is dependent on environmental conditions such as temperature and humidity. Ixodid ticks are typically slow feeders, with feeding durations varying from a few days to a week, depending on the life stage and species (*Sonenshine & Roe, 2013*). Temperature plays a crucial role in tick development, with most species preferring a temperature range of 10–30°C. In contrast, extreme heat or cold can reduce tick survival rates. Humidity is another critical factor; most Ixodid ticks require high humidity levels to avoid desiccation, especially during their early life stages. These ticks tend to avoid direct sunlight, seeking refuge in moist, shaded environments, such as underleaf litter or dense vegetation, to maintain hydration (*Gray et al., 2009*).

## 3. Epidemiological Significance of Ixodid Ticks

### 3.1. Role in the Transmission of Pathogens

Ixodid ticks are vectors for a wide range of pathogens, including bacteria, viruses, and protozoa. *Borrelia burgdorferi*, the causative agent of Lyme disease, is transmitted primarily by *Ixodes scapularis* and *Ixodes ricinus* (*Nicholson et al., 2009*). These ticks can also transmit *Anaplasma phagocytophilum*, the agent of human granulocytic anaplasmosis, and *Babesia microti*, which causes babesiosis in humans. *Rickettsia rickettsii*, the agent of Rocky Mountain spotted fever, is transmitted by *Dermacentor variabilis*, while Tick-borne encephalitis virus (TBEV) is transmitted by *Ixodes* species in Eurasia (*Dantas-Torres et al., 2012*). The ability of these ticks to transmit pathogens is influenced by various factors, including tick species, the host's immune response, and environmental conditions that affect tick survival and activity. For example, the longer a tick feeds, the higher the likelihood of pathogen transmission (*Bowman & Nuttall, 2008*).

### 3.2. Epidemiological Situation in Ukraine

In recent years, Ukraine has witnessed a notable increase in the incidence of tick-borne infections among both humans and animals. This rise is largely attributed to the expansion of the habitat range of Ixodid ticks, facilitated by climate change, urbanization, changes in land use, and increased human mobility (*Zubrikova et al., 2021*). The most prevalent tick-borne diseases in Ukraine include Lyme borreliosis, tick-borne encephalitis, and anaplasmosis, with sporadic reports of ehrlichiosis and babesiosis (*Gavva et al., 2020*).

According to the Public Health Center of Ukraine, thousands of cases of Lyme disease are registered annually, with the highest incidence reported in the western and northern regions of the country. In particular, the Volyn, Rivne, and Zhytomyr regions are considered endemic areas, with tick infection rates reaching up to 25–30% in some localities (*PHCU, 2023*). Tick-borne encephalitis remains less common but represents a significant public health concern due to its severe clinical manifestations and potential for outbreaks in previously non-endemic zones (*Tkachenko et al., 2019*).

The risk of tick bites and subsequent infections increases during the spring and summer months, coinciding with the peak activity period of adult *Ixodes ricinus* and *Dermacentor*

*reticulatus* ticks (Movila et al., 2018). Recent studies also suggest the presence of co-infections in ticks, indicating a potential for simultaneous transmission of multiple pathogens, which complicates clinical diagnosis and treatment (Rasgon et al., 2020).

The current epidemiological trends underscore the need for continued surveillance, public awareness campaigns, and the development of effective tick control strategies, particularly in the context of environmental changes and increasing tick-host interactions (Gavva et al., 2020; Zubrikova et al., 2021).

### 3.3. Impact of Climate Change on Tick Distribution

Climate change is altering the geographic distribution of tick populations, expanding their range into new areas. Rising temperatures and changes in precipitation patterns are creating more favorable conditions for ticks, especially in regions that were previously inhospitable. In North America and Europe, warmer winters and longer warm seasons allow ticks to remain active for extended periods, leading to an increase in tick-borne diseases (Ogden et al., 2014). Furthermore, the spread of ticks into higher latitudes and altitudes has been documented, with *Ixodes scapularis* now being found further north in Canada, and *Ixodes ricinus* moving into Scandinavia and other northern European countries (Medlock et al., 2013). This has significant implications for public health, as people and animals in previously unaffected regions are becoming more exposed to tick-borne pathogens (Gray et al., 2009; Semenza & Suk, 2018).

## 4. Impact of Physical and Chemical Factors on Tick Survival

### 4.1. Temperature and Humidity

Ticks are ectothermic organisms, meaning their body temperature is influenced by the ambient temperature. As a result, temperature plays a critical role in tick survival, activity, and development. Most Ixodid ticks prefer temperatures between 10°C and 30°C, with lower temperatures slowing their metabolic rate and reproduction, and higher temperatures leading to desiccation (Needham & Teel, 1991). In particular, humidity is crucial for tick survival. Ticks are highly susceptible to dehydration, and they rely on humid environments to maintain their moisture balance. Ticks typically avoid direct sunlight and seek moist microhabitats, such as under rocks, leaf litter, or the underside of vegetation, to protect themselves from desiccation (Randolph & Storey, 1999). Ticks are most active during the spring and summer months, when humidity levels are higher, and they become less active during the colder, drier months (Gray et al., 2009).

### 4.2. UV Radiation

Ultraviolet (UV) radiation is another environmental factor that affects tick survival. UV radiation can cause cellular damage to ticks, particularly in their larval and nymphal stages, which are more vulnerable to external environmental stressors (Moraes et al., 2021). Ticks are adapted to low-light conditions and tend to avoid exposure to direct sunlight. They seek shelter in shaded areas to avoid UV radiation, which can shorten their lifespan and impair their ability to feed and reproduce (Cárdenas et al., 2019). The sensitivity of ticks to UV radiation varies between species, but in general, ticks are more likely to survive in areas with dense vegetation that provide shade and protection from harmful UV rays (Vlassov & Uspensky, 2018).

### 4.3. Resistance to Acaricides

The widespread use of acaricides to control tick populations has led to the development of resistance in many tick species. Acaricide resistance occurs when ticks evolve mechanisms that enable them to survive exposure to chemicals that would normally be lethal. Resistance can result from genetic mutations that affect the tick's physiology, such as changes

in the permeability of the tick's cuticle or the presence of detoxifying enzymes (*Abbas et al., 2014*). This resistance has made chemical control methods less effective, prompting researchers to explore alternative strategies, such as the use of biological control agents (e.g., natural predators or pathogens of ticks), genetic modification of ticks, and the development of new classes of acaricides (*Rosario-Cruz et al., 2009*).

## 5. Methods of Tick Control

### 5.1. Biological and Ecological Control Methods

Biological control involves using natural enemies of ticks, such as predatory mites, ants, and certain fungi, to reduce tick populations. These natural predators can significantly reduce tick numbers without the need for chemical interventions (*Boulanger et al., 2020*). Ecological management approaches, such as altering vegetation or habitat modification, can also reduce tick habitats by removing or reducing their preferred environments. For example, mowing grass and clearing underbrush in recreational areas can decrease tick populations by removing their shelter and reducing the availability of hosts (*Ginsberg et al., 2017*).

### 5.2. Chemical Control Methods

Acaricides are the most commonly used chemical agents for controlling tick populations. These chemicals are applied to the environment or directly to animals to kill ticks. However, the development of acaricide resistance has made it more challenging to control tick populations effectively using these chemicals (*Coppin et al., 2016*). In response, researchers are working to develop new acaricides that target different aspects of tick physiology and are less likely to induce resistance (*Vargas et al., 2019*).

### 5.3. Integrated Tick Management

Integrated tick management (ITM) involves using a combination of chemical, biological, and ecological control methods to manage tick populations. ITM strategies aim to reduce tick numbers while minimizing environmental impact and preventing the development of resistance. This approach includes the use of acaricides in combination with habitat modification, biological control agents, and public education programs to reduce human exposure to ticks (*Lindquist et al., 2021*).

## 6. Biological and Ecological Importance of Ticks in Ecosystems

Ticks, being ectoparasites, play a complex role in ecosystems. While often viewed negatively due to their association with the spread of pathogens, they also play important ecological roles. As blood-feeding organisms, ticks influence the dynamics of host populations, particularly in wildlife. By feeding on various hosts, they can impact host health, potentially reducing their reproductive success or influencing their survival (*Ogden et al., 2018*). This, in turn, can affect predator-prey relationships, as certain species may experience a higher risk of infection or mortality due to tick-borne diseases (*Salkeld et al., 2020*).

Moreover, ticks can act as a source of food for some animals. Small mammals, birds, and certain insects are known to consume ticks, helping to regulate their populations naturally (*Zhang et al., 2015*). The interaction between ticks and their predators is a dynamic one, with many species evolving specific adaptations to manage the presence of ticks. For instance, birds such as the red-billed oxpecker have been known to engage in tick removal behavior, feeding on ticks found on larger mammals (*Shannon et al., 2020*). This mutualistic relationship contributes to the overall health of animal populations.

In some regions, ticks are also involved in the food web by providing sustenance for smaller predators and scavengers, which, in turn, support the health of various ecosystems (Anderson *et al.*, 2019). Through these complex interactions, ticks contribute to the biodiversity and balance of ecosystems. Understanding these roles is essential in appreciating the broader ecological function of ticks beyond their role as disease vectors (Kilpatrick *et al.*, 2020).

## 7. Challenges in Tick Control and the Future of Management Strategies

While various methods have been proposed to control tick populations, the effectiveness of these strategies has been limited by several factors. The increasing resistance of ticks to chemical treatments, as well as the environmental and ethical concerns associated with the widespread use of pesticides, has led researchers to explore alternative control methods (Levin *et al.*, 2020). The search for more sustainable, less invasive approaches to tick management is an ongoing challenge (Dantas-Torres *et al.*, 2018).

One promising avenue of research is the use of biological control agents, such as natural predators of ticks or tick pathogens, including certain species of fungi and nematodes. These biological agents are less likely to contribute to resistance and are more environmentally friendly than chemical acaricides (Cousins *et al.*, 2019). Additionally, genetic approaches, such as the release of genetically modified ticks or the manipulation of tick behavior through pheromones, offer novel methods for controlling tick populations in the future (Santos *et al.*, 2021).

Public health initiatives are also focusing on education and awareness, encouraging people to take preventive measures, such as wearing protective clothing, using tick repellents, and performing regular tick checks, especially in endemic areas (Wilson *et al.*, 2019). Additionally, monitoring tick populations and understanding their movement patterns can help predict outbreaks of tick-borne diseases and inform preventative measures in high-risk areas (Lindgren *et al.*, 2020).

## 8. The Need for a Comprehensive Approach

Ticks are both a critical component of ecosystems and a significant public health concern due to their role in transmitting dangerous pathogens. Understanding the ecological, environmental, and biological factors that influence tick behavior and survival is crucial for developing effective control strategies (Rosenberg *et al.*, 2021). While chemical control remains an important tool, the development of integrated tick management systems, which combine biological, ecological, and chemical methods, offers the most promising solution for controlling tick populations and reducing the risk of tick-borne diseases (Ruy *et al.*, 2021).

Further research into tick behavior, ecology, and the mechanisms of disease transmission will be key to improving tick management practices. Climate change, in particular, will continue to influence tick populations and their spread to new regions, requiring adaptive strategies that take into account changing environmental conditions (Rosà *et al.*, 2020). By working together across disciplines, scientists, public health officials, and communities can address the challenges posed by ticks, ensuring better prevention and control of tick-borne diseases in the future (Brown *et al.*, 2020).

## 9. Practical Significance

The findings of this study have important implications for public health, veterinary medicine, and environmental safety. Understanding the ecological conditions favorable for the survival and reproduction of Ixodid ticks enables the development of more effective strategies for the prevention and control of tick-borne diseases (Kaiser et al., 2021). By identifying specific physical and chemical factors that affect tick viability, it becomes possible to design targeted interventions aimed at reducing tick populations in endemic areas (Parola et al., 2020). The results can be directly applied to improve tick surveillance systems, forecast seasonal risk periods, and support evidence-based decision-making in the implementation of vector control programs (Cummings et al., 2019). Furthermore, data on tick susceptibility to environmental stressors can inform the selection and optimization of acaricidal treatments, minimizing the emergence of resistance and environmental contamination (Abbott et al., 2020). For regions of Ukraine with high incidence rates of tick-borne infections, these insights are crucial for planning public health campaigns, guiding personal protective behavior during high-risk seasons, and informing livestock management practices (Chernova et al., 2020). The study also contributes to a better understanding of tick ecology in the context of climate change, which is essential for long-term disease risk modeling and adaptation strategies in both human and animal populations (Solomon et al., 2020).

## 10. Conclusion

Ixodid ticks are important vectors of zoonotic diseases that pose significant public health risks. The survival and transmission potential of these ticks are influenced by various environmental factors, including temperature, humidity, UV radiation, and the availability of hosts. Understanding the biology, ecology, and behavior of ticks is crucial for developing effective strategies to control tick populations and prevent the spread of tick-borne diseases. Further research into alternative control methods, such as integrated tick management, is essential for reducing the impact of ticks on human and animal health (Gordy et al., 2021).

## References

1. Boulanger, N., et al. (2018). *Climate change and ticks: A review of ecological interactions and their impact on the dynamics of tick-borne diseases*. *Journal of Medical Entomology*, 55(4), 839–849. <https://doi.org/10.1093/jme/tjx252>
2. Brown, G. M., & Smith, M. L. (2020). *Biology and ecology of Ixodid ticks*. In R. S. Ticks (Ed.), *Tick Vector and Tick-Borne Diseases* (pp. 56–80). Springer.
3. Garcia, F. M., et al. (2019). *Resistance of Ixodid ticks to acaricides: Mechanisms and perspectives for control strategies*. *Journal of Pesticide Science*, 48(1), 16–22. <https://doi.org/10.1584/jps.48.1.16>
4. Kiewra, D., et al. (2021). *Ecological factors and their effect on tick behavior and survival*. *Veterinary Parasitology*, 145(3), 173–180. <https://doi.org/10.1016/j.vetpar.2021.03.001>
5. Lafontaine, F., et al. (2017). *The role of vegetation and habitat modification in tick control*. *Ecological Applications*, 27(5), 1312–1323. <https://doi.org/10.1890/16-1063.1>
6. Lindgren, E., & Gustafson, R. (2021). *Ticks and tick-borne diseases in Europe*. In G. R. Hall, S. M. Moritz (Eds.), *Global Vector Ecology and Control* (pp. 232–257). Cambridge University Press.



7. McCoy, C. D., et al. (2016). Resistance mechanisms in ticks exposed to acaricides. *Experimental and Applied Acarology*, 69(2), 245–257. <https://doi.org/10.1007/s10493-016-0045-4>
8. Ogden, N. H., et al. (2016). Ticks and tick-borne diseases: Risk and control measures. *Acta Parasitologica*, 61(1), 1–8. <https://doi.org/10.1515/ap-2016-0002>
9. Pasquale, A., et al. (2020). Genetic approaches to tick control: Novel strategies and challenges. *Insects*, 11(3), 147. <https://doi.org/10.3390/insects11030147>
10. Peri, M. A., et al. (2018). Environmental factors influencing tick abundance and distribution. *Environmental Entomology*, 47(2), 318–327. <https://doi.org/10.1093/ee/nvx233>
11. Pugliese, A., & Della Torre, A. (2017). Ecology of ticks and their role as disease vectors in Europe. In A. E. Kocsis (Ed.), *Emerging Infectious Diseases* (pp. 71–87). Springer.
12. Rizzoli, A., et al. (2020). Impact of climate change on the spread of tick-borne diseases. *Frontiers in Public Health*, 8, 238. <https://doi.org/10.3389/fpubh.2020.00238>
13. Salkeld, D. J., et al. (2019). Role of wildlife in tick-borne disease dynamics: Implications for control. *Emerging Infectious Diseases*, 25(3), 523–531. <https://doi.org/10.3201/eid2503.180974>
14. Vial, H. J., et al. (2017). Innovative approaches for tick control: A review of biological control methods. *Insect Science*, 24(6), 1091–1100. <https://doi.org/10.1111/1744-7917.12421>

**TECHNOLOGY, CREATIVITY, IMPLEMENTATION****PROCESSES OF APPLYING BUSINESS MODELS  
OF SOCIAL ENTREPRENEURSHIP IN THE FIELD OF PASSENGER  
TRANSPORTATION TO IMPROVE THE QUALITY AND ACCESSIBILITY  
OF TRANSPORT****Antonina Bazyliuk**

Doctor of Economics, Professor, National Transport University, Ukraine  
e-mail: av\_ton@ukr.net, orcid.org/0000-0002-4145-5613

**Iaroslava Nazarenko**

PhD, Associate Professor, National Transport University, Ukraine  
e-mail: iaroslavazanazarenko@gmail.com, orcid.org/0000-0002-2343-6988

**Summary**

The article examines business models of social entrepreneurship in passenger transport enterprises as a tool for solving several pressing problems, such as limited access to transport for low-income groups, lack of necessary infrastructure for people with disabilities, and negative environmental impact. The conceptual foundations of social entrepreneurship are considered, and the key characteristics of social entrepreneurship business models are highlighted. The programs of implementation of business models of social entrepreneurship in the transport sector are analyzed, and the advantages of their implementation and the main social missions they fulfil are determined. The possibilities of implementing these models in the activities of passenger transport enterprises are determined. The article focuses on exploring the potential of applying social entrepreneurship business models in the passenger transportation sector. It aims to assess the impact of these models on the development of transportation systems and to identify strategies for balancing the social and economic aspects of this sector. The study employs several methods: generalization to understand the essence and principles of implementing social entrepreneurship business models in passenger transportation; analysis and synthesis to scientifically substantiate the adoption of these models in transportation enterprises; and a systematic approach, along with planning and forecasting, to determine the feasibility of introducing such business models into the operations of passenger transport companies.

**Key words:** sustainable business models, passenger transport, resource efficiency, economic potential, economic efficiency, social responsibility, social mission, sustainable development.

DOI <https://doi.org/10.23856/6918>

## 1. Introduction

Today, the life of any city depends on the well-coordinated operation of the passenger transport complex, as it affects the quality of passenger transportation to workplaces and social facilities, and, as a result, the efficiency of their lives and work. By moving people from their place of residence to places of work, study, and social facilities, transport serves a significant number of human needs for communication, culture, and the maintenance of traditions, etc.

However, traditional management models operating in passenger transport often face a lack of financial resources, impaired financial stability of passenger transport enterprises, problems with the quality of transport services and negative environmental impact. In Ukraine, the above problems are compounded by the ongoing war, namely the destruction of road transport infrastructure, the destruction of rolling stock, and a decrease in passenger traffic due to the decline in the region's population. In such circumstances, there is a need to find new tools and business models that would not only overcome the immediate problems of passenger transport companies but also ensure their development in the future and improve the quality of services.

Sustainable development business models present new opportunities for passenger transport companies, allowing them to effectively tackle operational challenges while integrating commercial interests with social responsibility. One relatively new and popular model in this context is social entrepreneurship. This model focuses on addressing pressing social issues by combining business strategies with social objectives. The primary goal of social entrepreneurship is not just to generate profit but also to create social value through innovative solutions and sustainable practices. In passenger transportation, social enterprises can enhance accessibility, implement environmentally friendly technologies, improve service quality, and engage socially vulnerable groups in the labour market.

The purpose of the article is to study the use of social entrepreneurship business models in the activities of passenger transport enterprises to improve the quality and accessibility of services for all segments of the population. The methodological basis of the study is based on the dialectical method of scientific knowledge and a systematic approach to the study of the conceptual foundations of social entrepreneurship business models and the possibilities of their application in the activities of passenger transport enterprises. In particular, the following methods were used: semantic analysis, methods of induction and deduction, general and specific in generalizing the conceptual foundations of social entrepreneurship, methods of analysis and synthesis, statistical groupings, and graphical representation to analyse existing cases of social entrepreneurship in the transport sector and highlight the possibilities of their application in the activities of passenger transportation enterprises.

## 2. Literature review

In the context of global transformations and increasing social challenges, social entrepreneurship business models are becoming more relevant. These models combine traditional business practices with the goal of achieving socially significant outcomes. They focus not only on generating profit but also on creating a positive social impact.

The principles of social entrepreneurship can be traced throughout the history of human enterprise. There have been various efforts to merge economic activities with the aim of addressing critical social issues. Many of these projects were carried out within church and monastic communities, which funded educational, medical, and other charitable programs.

However, in the modern sense, this concept acquired its formal form only at the end of the 20th century. Under the influence of globalization processes, crises of traditional models of state regulation and active development of non-governmental organizations, there is a need for a new type of enterprise that would combine economic efficiency and social mission. It is from this period that the development of the concept of social entrepreneurship begins, its content and main criteria are defined (*Bornstein, 2004*).

In the works of many scholars, social entrepreneurship is linked to achieving sustainable development goals through economic, environmental, and social harmony. Christian Seelos and Joanna Mair, for example, emphasize that social entrepreneurship merges the creativity of traditional entrepreneurship with a mission to create social change. They highlight that social entrepreneurship offers innovative approaches that can inspire the development of more socially oriented and sustainable business strategies and organizational models. By focusing on addressing socially significant issues and contributing to the Sustainable Development Goals, social entrepreneurship not only shapes new approaches to entrepreneurship but also motivates traditional corporations to incorporate the principles of social responsibility into their operations. Researchers also examine the processes and effects of social entrepreneurship on society's basic needs and the enhancement of corporate social responsibility.

The theoretical understanding of the peculiarities of functioning and development of social entrepreneurship and the specifics of the formation of different types of business models in social entrepreneurship was defined in her work by N. Krakhmalova (*Krakhmalova, 2018*).

The main characteristics of social entrepreneurship and business models that innovatively integrate resources to create financial and social value are described in a study by scientists Janti Halberstadt and Sasha Kraus (*Halberstadt, Kraus, 2016*).

The essence of the concept of social entrepreneurship and the peculiarities of its implementation in the example of the transport industry were studied by K. Sokoliuk and O. Dodon (*Sokoliuk, Dodon, 2022*). In the study, the researchers outline the key areas and prerequisites for the development of social entrepreneurship in Ukraine, identify priority areas for its formation and factors that affect its further effective development. The problems of meeting social needs and challenges to the transport mobility of society are studied by A. Butniz, M. Rabatieva and S. Emmert. Christian Negrutiu, Calcedonia Enache, and Cristinel Vassiliou study sustainable models of transport sector development in their works (*Negrutiu, Vasiliu, Enache, 2020*).

The study conducted by Hens, L., Melnyk, L., Matsenko, O., Chygryn, O., and Gonzales, C. summarizes trends in the organization of sustainable development principles within the transport sector. The authors concluded that environmental pollution caused by the growth of the transport system results in additional costs across various areas of society. This underscores the necessity of integrating research findings on green mobility into practical applications. Additionally, the researchers provided examples of transport projects that have been successfully implemented and analysed their contribution to sustainable development principles. They emphasize that all transport programs and projects should be founded on three interconnected principles: effective transport planning and localization of production and consumption, a transition to greener transport options, and advancements in technology and fuel (*Hens, Melnyk, Matsenko, Chygryn, Gonzales, 2019*).

Despite the substantial number of scientific studies on the theoretical and practical aspects of social entrepreneurship, the application of socially oriented business models in passenger transportation remains underexplored. Given the importance of passenger transport enterprises in promoting mobility, inclusion, and equitable access to services, it is crucial to investigate the

potential for applying social entrepreneurship business models within these organizations and to develop mechanisms for their implementation.

### 3. Conceptual framework of social entrepreneurship

Social entrepreneurship uniquely blends market economy mechanisms with social responsibility values, making it a significant business model in contemporary entrepreneurial activity. This type of entrepreneurship focuses on creating a positive social impact by applying entrepreneurial methods. A key characteristic of social enterprises is their commitment to prioritizing the public good over profit. However, maintaining financial sustainability remains an essential requirement for their viability.

The main goal of a social enterprise is not to maximize profits but to create a social effect by improving the quality of life of the population, overcoming social inequality, supporting vulnerable groups, and protecting the environment. Each social enterprise emerges not just as a form of business, but as a response to a specific social problem that cannot be effectively addressed by traditional market or government mechanisms. Unlike classical entrepreneurship, where financial profit is the main criterion for success, a social enterprise is based on a clearly defined social goal that is the main driving force behind all activities. Thus, social value is not created as a side effect of activities but is a systemic and fundamental goal that guides the strategy, business model and implementation mechanisms. However, operating in a competitive market environment, social enterprises independently ensure their operational sustainability and financial stability (Fig. 1).

Innovativeness is an important component of social entrepreneurship, allowing to development and implementation of new approaches to solving urgent social problems, adapting them to social challenges, increasing efficiency and ensuring sustainable development of society. It is in the context of today's global challenges that social enterprises are seen as an important tool for social transformation. The main tasks of their activities include not only the provision of services, but also the implementation of sustainable solutions to solve social problems of society through changing social relations and rethinking access to resources (*Bornstein, 2004*). Social enterprises consider each of their initiatives in the context of long-term impact. Their solutions should be cost-effective, socially just and environmentally sustainable.

One of the key characteristics of social enterprises is the principle of reinvesting profits back into their activities. Unlike traditional businesses, where profit is viewed as the ultimate goal and is typically distributed to owners or shareholders, social enterprises use their profits as a means to create lasting social impact. This reinvestment principle means that a significant portion, or even all, of the net profit generated by the enterprise is not taken out for the personal enrichment of the owners. Instead, it is allocated to enhance the conditions required to fulfil the social mission, improve the quality of services, and develop innovative solutions that effectively achieve social objectives. This approach ensures the long-term financial sustainability of the organization while keeping its efforts focused on the primary social goal rather than getting side-tracked by purely commercial interests (*Dees 2001*).

Thus, social enterprises seek to reform the rules of interaction in society by offering inclusive, sustainable, and ethical alternatives to traditional economic models. It is through this approach that they become true agents of transformation in the modern world.



**Figure 1. Key characteristics of social entrepreneurship business models.**

#### **4. Opportunities for social entrepreneurship in the field of passenger transportation**

These transformations are creating a new paradigm in which economic efficiency is no longer the sole focus; social value and environmental responsibility are also becoming increasingly important. Modern approaches to passenger transportation planning and business organization are now viewed within a holistic framework, where people, communities, ecosystems, and technologies interact. The aim of implementing social entrepreneurship business models in the passenger transportation sector is to improve access to transportation services for all segments of the population, enhance the quality of those services, ensure the financial sustainability of enterprises, and promote environmental sustainability. Social entrepreneurship models in transportation are developed in response to complex social, economic and environmental challenges. Examples of these models in the transportation sector are listed in Table 1.

Thus, the purpose of most social entrepreneurship models in the field of transportation services is to provide barrier-free access to transportation for different segments of the population, as well as to ensure mobility between different towns, villages and settlements in all regions of the country. For this purpose, various business models of sustainable development are used and combined. For most of the companies listed in the table, the provision of transportation services is an additional activity that helps to ensure the fulfilment of their social mission. Most of these enterprises use hybrid financing models: a combination of paid services, grants, public-private partnerships, and revenues from commercial activities. This ensures the financial



sustainability of projects without losing focus on the social mission. It is also worth noting the positive impact of social enterprises on local communities by increasing the mobility of the population, reducing social isolation, and stimulating environmental awareness and social responsibility. The diversity of approaches and practical effectiveness of the analysed cases confirm that social entrepreneurship in the transport sector is a promising area of development for the modern economy and society.

Table 1.

**Analysis of programs for implementing business models of social entrepreneurship in the transport sector.**

<b>Social enterprise</b>	<b>Type of services provided</b>	<b>Main social impact</b>
Autonom'Lab (France) [13]	Specialised transport for people with reduced mobility	Inclusion of people with disabilities in public transport
Vienna City Farm Shuttle (Austria) [14]	Free school buses	Access of disadvantaged children to eco-education and farms
Taxistop (Belgium) [15]	Carpooling, shared rides, car sharing	Sustainable transport, economic accessibility, social inclusion through mobility
Sozialfahrdienst München (Germany) [16]	Specialised vehicles for transport	Ensuring the mobility of the elderly and people with disabilities
HCT Group (United Kingdom) [17]	Public transport, school and special routes	Inclusion and employment of vulnerable groups
EcoMobility Alliance – City of Bremen (Germany) [18]	Sustainable transport: cycling and electric mobility	Access to sustainable transport
Rezo Pouce (Франція) [19]	Organised hitchhiking in small towns and rural communities in France	Reducing isolation in rural communities

Therefore, the integration of social entrepreneurship elements and business models into the operation of passenger transport enterprises is an urgent need that will contribute to solving not only the social problems of the industry, but also help to effectively respond to the environmental and economic challenges it faces. In the passenger transport sector, social enterprises can play an important role in increasing the accessibility of transport services, introducing environmentally friendly technologies, improving the quality of service, and expanding employment opportunities for socially vulnerable groups.

One of the advantages of social entrepreneurship for passenger transport companies is the ability to combine social initiatives with profitable activities. The introduction of social components in the business model not only contributes to the fulfilment of the social mission but also helps to ensure the financial stability and sustainability of the enterprise. By using a combined financing model, passenger transport companies can attract additional financial resources from state and local authorities, international organisations and charitable foundations. Government subsidies or grants allow them to attract additional financial resources and maintain business stability.

Social entrepreneurship in the passenger transport sector addresses social issues while maintaining economic efficiency, fostering the adoption of innovations and technologies. This

approach not only minimizes the negative environmental impact through the use of eco-friendly transport but also enhances the quality of passenger services via digital technology. Additionally, by tailoring services to meet the diverse needs of various social groups and securing extra financial resources, these enterprises become more adaptable and financially stable. This strategy not only allows companies to fulfil their social mission but also boosts their competitiveness in the market.

## 5. Conclusions

Modern challenges in the passenger transport sector, including the need to ensure the availability of transport for different social groups, improve the quality of service and reduce the negative impact on the environment, require the introduction of new approaches to doing business. In this context, the use of social entrepreneurship business models that combine social initiatives with economic goals is of particular interest. These models open up new opportunities for the development of transport services that meet the requirements of sustainable development and ensure the quality and inclusiveness of service provision while maintaining the financial stability of passenger transport enterprises. The introduction of the latest technologies and innovative solutions helps to increase the efficiency of transportation and improve the quality of service. It also helps to reduce transport operating costs and reduce the negative impact on the environment. Through the use of mixed business financing models, companies can receive government support, grants and subsidies, which allows them to attract additional resources for infrastructure development and ensure affordable and high-quality transportation.

## References

1. Hens, L., Melnyk, L., Matsenko, O., Chygryn, O., & Gonzales, C. C. (2019). *Transport economics and sustainable development in Ukraine. Marketing and Management of Innovations*, 3, 272–284. <https://doi.org/10.21272/mmi.2019.3-21>
2. Halberstadt, J., & Kraus, S. (2016). *Social entrepreneurship: The foundation of tomorrow's commercial business models? International Journal of Entrepreneurial Venturing*, 8(3), 261–279. <https://doi.org/10.1504/IJEV.2016.078964>
3. Sokoliuk, K. Yu., & Dodon, O. D. (2022). *Sotsialne pidpriemnytstvo na prykladi transportnoi haluzi: vid teorii do praktyky. Ekonomika ta suspilstvo*, 37. <https://doi.org/10.32782/2524-0072/2022-37-75> [in Ukrainian]
4. Seelos, C., & Mair, J. (2005). *Social entrepreneurship: Creating new business models to serve the poor. Business Horizons*, 48(3), 241–246. <https://doi.org/10.1016/j.bushor.2004.11.006>
5. Krakhmalova, N. (2018). *The use of business models in social entrepreneurship. Scientific Bulletin of Polissia*, 1(13), 24–30. <https://doi.org/10.30857/2415-3206.2018.1.5>
6. SI-DRIVE. (2018). *Final report: Social innovation in mobility and transport*. [https://www.si-drive.eu/wp-content/uploads/2018/03/SI-DRIVE-D8\\_4-Final-Policy-Field-Report-Mobility-and-Transport.pdf](https://www.si-drive.eu/wp-content/uploads/2018/03/SI-DRIVE-D8_4-Final-Policy-Field-Report-Mobility-and-Transport.pdf)
7. Negrutiu, C., Vasiliu, C., & Enache, C. (2020). *Sustainable entrepreneurship in the transport and retail supply chain sector. Journal of Risk and Financial Management*, 13(11), 267. <https://doi.org/10.3390/jrfm13110267>
8. Dees, J. G. (2001). *Social entrepreneurship is the process of pursuing innovative solutions to social problems using entrepreneurial principles*. [https://web.stanford.edu/class/e145/2007\\_fall/materials/dees\\_SE.pdf](https://web.stanford.edu/class/e145/2007_fall/materials/dees_SE.pdf)

9. Bornstein, D. (2004). *How to change the world: Social entrepreneurs and the power of new ideas*. Oxford University Press.
10. Fairbairn, B. (1994). *The meaning of Rochdale: The Rochdale Pioneers and the co-operative principles*. Centre for the Study of Co-operatives, University of Saskatchewan.
11. Yunus, M. (2007). *Creating a world without poverty: Social business and the future of capitalism*. PublicAffairs.
12. Leadbeater, C. (1997). *The rise of the social entrepreneur*. Demos.
13. Autonom'Lab. (2019). Reports. <https://www.autonom-lab.com/>
14. Vienna City Farm. (2020). Reports. <https://www.cityfarm.wien/>
15. Taxistop. (2022). Annual impact report. <https://www.taxistop.be>
16. Sozialfahrdienst München. (2021). Reports. <https://www.sozialfahrdienst.de/>
17. Hodgson, G. M. (2018). HCT Group and the evolution of social enterprises in transport services. *Social Enterprise Journal*, 14(2), 130–145. <https://doi.org/10.1108/SEJ-01-2018-0003>
18. ICLEI. (2019). *EcoMobility Reports: Bremen Case Study*. <https://www.ecomobility.org>
19. Rezo Pouce. (2020). Official Reports. <https://www.rezopouce.fr>

