

МІНІСТЕРСТВО ОСВІТИ І НАУКИ УКРАЇНИ

Соціум. Документ. Комунікація

Том 8, № 3

Заснований у 2015 році
Видається чотири рази на рік



Переяслав
2023

Засновник:

Університет Григорія Сковороди в Переяславі

Рекомендовано до друку та поширення
через мережу Інтернет Вченою радою
Університету Григорія Сковороди в Переяславі
(протокол №3 від 8 листопада 2023 р.)

**Свідоцтво про державну реєстрацію
друкованого засобу масової інформації**
серії KB, № 25192-15132 ПР від 20.07.2022

Наказом Міністерства освіти і науки України № 886 від 02.07.2020 р. відповідно до рішення Атестаційної колегії Міністерства освіти і науки України збірник наукових праць «Соціум. Документ. Комунікація» (серія «Історичні науки») внесений до Переліку фахових видань України, категорія «Б».
Наказом Міністерства освіти і науки України № 894 (Додаток № 2) від 10.10.2022 р. відповідно до рішення Атестаційної колегії Міністерства освіти і науки України збірник наукових праць. Соціум. Документ. Комунікація» (серія «Соціальні комунікації») внесений до Переліку фахових видань України, категорія «Б»

Збірник наукових праць представлено у міжнародних наукометричних базах даних, репозитаріях та пошукових системах: Google Scholar, Academic Resource Index – Research Bib, ULRICHSWEB, Національна бібліотека України імені В. І. Вернадського, Українські наукові журнали

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MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE

Society. Document. Communication

Volume 8, No. 3

Established in 2015
Issued quarterly



Pereiaslav
2023

Founder:

Hryhorii Skovoroda University in Pereiaslav

Recommended for printing and distribution
via the Internet by the Academic Council
of Hryhorii Skovoroda University in Pereiaslav
(Minutes No. 3 of November 8, 2023)

**Certificate of state registration
of the print media**

Series № 225192-15132 PR dated 20.07.2022

By order of the Ministry of Education and Science of Ukraine No. 886 of July 2, 2020,
in accordance with the decision of the Attestation Board of the Ministry of Education
and Science of Ukraine, the collection of scientific works "Society. Document. Communication"
(series "Historical Sciences") is included in the List of professional publications of Ukraine, category "B".
By order of the Ministry of Education and Science of Ukraine No. 894 (Appendix No. 2) of October 10, 2022,
in accordance with the decision of the Attestation Board of the Ministry of Education
and Science of Ukraine, a collection of scientific papers. "Society. Document. Communication"
(series "Social Communications") entered into the List of Professional Publications of Ukraine, category "B"

**The journal is presented international scientometric databases, repositories
and scientific systems:** Google Scholar, Academic Resource Index – ResearchBib, ULRICHSWEB,
National Library of Ukraine after V.I. Vernadskiy, Ukrainian Scientific Journals

Editors office address:

Hryhorii Skovoroda University in Pereiaslav
08400, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
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Documentation systems of road transport institutions as an indicator of corporate information subculture

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Abstract. In the modern conditions of the transition to the information society, there is a need to develop an appropriate information culture of the business entity, to systematize the basic principles of documentation support for its management, a balanced study of documentation systems, including their interrelationship, for the further implementation of information technologies, the application of electronic document management systems. The purpose of the work is a comprehensive exploration of the infrastructure and industry documentation systems of the institution, the clear construction of blocks of documentation systems and the arrangement of their components, the perfect knowledge and understanding of which contributes to the application of progressive principles of its management, raising the level of its corporate culture. Systemic and socio-communicative approaches were used during the research, which made it possible to substantiate the division of documentation systems into blocks, to establish communication links between infrastructural, regulatory and industrial documentation, and to determine the role of each of its components. The application of the method of ascent from the abstract to the concrete contributed to the transformation of general issues of documentation support of the business entity to the construction of specific documentation systems of the transport institution. The article represents the authors' point of view on the construction of systems of infrastructural and industrial documentation, which take place in the documentation support of the management of the institution on the example of a motor vehicle enterprise. Infrastructural documentation is presented as functional to ensure the management of all areas of the institution's activities, containing blocks of management documentation systems (general, economic blocks and a block of social documentation). The purpose of each of the systems of professional documentation, their components and the relationship between them is revealed. A block of regulatory and information support documentation has been singled out, which serves both the general goals of the organization's management and each of its areas of activity. In this study, a complex system of documentation of the organization is proposed as an indicator of the level of its information culture, a component of corporate culture, which characterizes the degree of joint achievements of employees in possible types of work on managing documentation, creating information products and services. The

Suggested Citation:

Palekha, Yu., & Aliksieienko, K. (2023). Documentation systems of road transport institutions as an indicator of corporate information subculture. *Society. Document. Communication*, 8(3), 8-21. doi: 10.69587/sdc/3.2023.8.



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results of the research can have practical application in all transport organizations when implementing and applying the latest systems and technologies for working with documented information

Keywords: documentary and information base; branch; classification analysis; main production; auxiliary and service production

Introduction

Without creating the necessary conditions for building a proper level of information culture, manifested in the ability to properly organize the institution's documentation systems, the staff's capability to arrange its document and information base, knowledge of current regulatory acts, relevant provisions, and standards, technological processes of main, auxiliary, and service production, the implementation of automated document management processes, increased labour productivity, and organizational efficiency is impossible. Several scientific investigations by foreign and Ukrainian scholars have been dedicated to exploring the relationship between information culture, as a component of corporate (organizational) culture of the institution, and document management processes within it.

For instance, practical guidelines and instructions regarding the use of information culture principles to support document management practices, ideas, and recommendations based on scientific research, with the involvement of long-term teaching experience and scientific investigations in various countries, are presented in the work "Records Management and Information Culture: Personnel Issues" by O. Gillian & F. Foscari (2019). The scholars affirm that the personnel of the institution, their background, attitude towards the product, the value they attach to information, etc., are the main factors determining the results of document management work.

Organizational subculture, constructive deviations, application of appropriate technologies as a result of corporate information system implementation, have been traced by Chinese researchers R. Lissillour & J. Wang (2021). The study of technological aspects of information culture in municipal organizations is the focus of Indonesian scholars J.T. Nugraha *et al.* (2022), in which researchers concentrate on determining the factors influencing e-government service delivery in the city. The scientific investigations into document management practices (DM) in small and medium-sized automotive institutions were undertaken by M.A. Macías-Jiménez *et al.* (2020).

G. Yeo (2018) has focused on the issues of documentation, information fixation, and the role of record-keeping in information culture. Yeo emphasizes that maintaining official documentation (record-keeping) is a matter of organizational policy and proper business practice, developed and "embedded" in work processes to ensure that, when necessary, it can refer to records of past transactions, provide evidence of its financial or contractual obligations, avoid disputes, rely on evidence

of past events to make informed decisions regarding tactical and strategic plans; be accountable for its actions and decisions.

The influence of organizational culture on the effectiveness of information management processes in higher education institutions was discussed in a publication by A. Daneshmandnia (2019), a PhD in information studies from Long Island University, who emphasized that the institution's ability to use automated systems, implement software directly depends on the level of its corporate culture. Neglecting this factor, the scholar noted, could lead to failures in managing information processes.

Long-standing research on technological processes of working with documented information in the organization as an indicator of corporate information subculture has been devoted to the scientific school of employees of the Department of Information and Analytical Activity and Information Security of the National Transport University (NTU), Lviv Polytechnic, Kyiv University of Culture and Arts (Palekha *et al.*, 2022), in which the researchers defined the concept of "organizational information culture", analysed its elements and components, examined technological processes of working with documented information, starting from its creation, processing, formation of documentation systems, document management, and ending with its protection and archival storage.

N.P. Filippova (2019) has focused on document work in the healthcare field, conducting a classification analysis of medical documentation and providing a characterization of its main types. The basics of implementing, the positive and negative aspects of electronic document circulation, as an imperative of modern trends in informatization, its dependence on the documentation system created at the enterprise, have been disclosed in the works of N. Mykytenko (2019), S.A. Harkusha (2020), M. Malanchuk & Y. Zhakun (2021).

The aim of this study was to determine and scientifically substantiate, using the example of documentation support of an automotive enterprise, the components of documentation systems, characterize the content and purpose of each of them, and analyse inter-species and internal relationships between them.

Materials and Methods

The methodology of the conducted research is determined by the specificity of the object of scientific inquiry and involves the application of general scientific and specialized methods and approaches. The methods of

deduction and induction from abstract to concrete allowed transitioning from the study of general issues of documentation support in organizational management to the construction of specific blocks of documentation systems, establishing clear connections between various types of documentation directly within the automotive institution.

The use of cultural, systemic, functional, socio-communicative, and informational approaches, along with modelling and comparative methods, enabled the examination of the construction of documentation system blocks as an integral component of the information infrastructure of the automotive institution. Through the cultural approach, the main components of the organization's information culture were identified, including documentation culture, information search and processing culture, documentation process management culture, legal and techno-technological culture, and information management culture concerning official documents.

The systemic approach allowed revealing the essence and systemic properties of the research object – the complex of blocks of infrastructure and production documentation systems of the institution, using a typical automotive enterprise as an example. It presented the basic principles of organizational and functional unity and interrelation of their components, corresponding to a certain level of structuring and conditions for configuring external and internal relationships between them. The socio-communicative approach provided insights into the main characteristics of the subject of the study – the communicative interaction of documentation systems at the level of intra-block, inter-block, and external connections. This approach substantiated the defining ideology of system construction – the establishment of principles for the implementation of information management technologies at the institutional level, the formation of a common working environment based on a corporate document management system, open to interaction with all its functional units. The informational approach was reflected in the specifics of informatization in working with official documents, the formation, and evaluation of the effectiveness of building documentation systems.

The application of modelling methods allowed constructing a block system of documentation for the transport institution, identifying directions for further development of electronic document management and studying the efficiency of its operation. When exploring the components of functional and production documentation blocks of the institution, the comparative method was applied, similar to the approach used by K.I. Klymova (2021) in researching various specialized documentation systems (banking, notarial, patent), which facilitated the identification of common principles of documentation system functioning and factors influencing them.

Among the research materials, significant attention was paid to the institution's compliance with legislative

and regulatory acts, the knowledge of which demonstrates the organization's information culture. Thus, in examining legal documentation, emphasis was placed on the unconditional adherence to laws and subordinate acts, resolutions of the Verkhovna Rada, the Cabinet of Ministers, and decrees of the President of Ukraine, as well as orders, directives, decisions, and instructions of governmental institutions. Considerable attention was devoted to the role of the regulatory framework in the functioning of documentation systems for the transport sector at both the national and sectoral levels. The significant importance of the National Classifier NK 010:2021 (2021) and other regulatory documents for organizing official documents was highlighted.

Results and Discussion

Infrastructure documentation as a reflection of management functions within an institution. Infrastructure types of documentation of an automotive institution, like any business entity, are types of documentation functioning within the infrastructure of every sphere of social-political, economic, or financial-legal activity, with its division into managerial, normative, and informational components. Managerial documentation, as known, is a functional documentation system intended to ensure the performance of management functions within the institution and control by its management over effective management. It has an organizational-administrative and informational character and serves, if necessary, for the adoption of relevant managerial decisions. It includes general, economic, and social blocks of documentation systems.

The general block of documentation systems (Block A). The general block of documentation systems, as the main component of the management documentation of the institution, includes documentation on the creation, functioning, and termination of the legal entity's activity, documentation on personnel management, and other types of documentation, including organizational, administrative, reference-informational, reporting-statistical, and primary accounting service documents. Organizational, administrative, and reference-informational documents constitute the organizational-administrative documentation – a subsystem of management documentation that ensures the performance of organizational and administrative functions of management. Organizational documents (A1) – a set of documents that serve to develop, arrange, and adjust certain activities, allow coordinating actions, coordinating the work of departments and employees to solve common tasks, providing their actions with planning, coordination, and organization. The development of these documents initiates not only the activities of a particular business entity but also managerial activities, the main regulator of which is the law. Organizational documents typically include regulations, statutes, founding agreements, regulations, instructions, rules, schedules, staffing tables, collective agreements, and, to some extent, commercial

and civil contracts. The development of these documents is preceded by reconnaissance of various aspects of the functioning of the business entity and relevant legislative acts, especially concerning the development of fundamental documents regarding the strategic development plan, the purpose of operation, mission and policy, business plan (if applicable to a privately owned organization), etc. Administrative documents (A2) – a set of documents that regulate certain activities, if necessary, legalize, suspend, modify legal relationships, and are created in cases provided for by law. Administrative activity documents include various orders, directives, instructions, resolutions, decisions, orders, etc. Reference-informational documents (A3) – reports and explanatory notes, protocols, conclusions, statements, certificates, reports, lists, work plans, schedules, etc. Unlike organizational and managerial documents, the information contained in them can induce action or can only be brought to attention. Primary accounting documentation (A4) – a system of documentation used to manage the production and economic activities of business entities of all forms of ownership. Primary documents may serve to record information about the surrounding reality, be the result of scientific research, or be a document that enters a certain information system for further processing and transformation into secondary documents. Reporting-statistical documentation (A5) – a set of documents containing information on the performance of planned indicators and allowing for responsible decisions at the level of the institution as well as regionally or nationally. Reporting documents serve to improve the state of affairs in the institution in the future compared to the existing one and can be accompanied by extensive commentary.

Economic Block of Documentation Systems (Block B). The successful functioning of an institution, effective management thereof, is impossible without the punctual reflection of its economic indicators, existing mutually beneficial trade agreements, balanced pricing policies, and other indicators, all of which find their reflection in the economic block of documentation systems. Documentation serves as the basis for the management apparatus to make relevant decisions regarding its management and includes subsystems of financial, accounting, planning, budgeting, and contractual documentation, etc. For example, the financial documentation of an institution (B1) comprises a set of documents related to tax and levy payer accounting; corporate tax reporting documents; documents used in budget execution processes; financial reporting documents of entities, trustees, etc. It includes documents containing approved budget allocations, income and expenditure statements, records of various audits, results of inventories, reports on currency inflows to the institution, its currency usage plans, evidence of payments made, consolidation of key indicators, applications-orders for foreign currency provision, cargo transportation,

etc. Financial documentation of an institution also includes documents serving as a basis for non-cash transactions in banks, accounting entries, verification of cash transactions correctness, and their reflection in financial accounting. Accounting documentation of an institution (B2) consists of a collection of written evidence of a certain form and content containing information about economic transactions and serving as proof of their occurrence. Major types of such documentation include annual reports, equity capital (form 5ds) and cash flow reports (form 2d), reports on the financial and property status of the institution and its debt to budget funds (form 7d), general ledger, and institution's financial statements (form 1ds), cash books and payment documents, accounts and records, debtor and creditor statements, etc. Planning documentation of an institution (B3) is a documentation system used to solve forecasting and planning tasks of the institution's economic performance and includes a set of documents related to studying and forecasting demand, planning freight transportation, rational distribution thereof by cargo type, types of rolling stock, points of dispatch, and destination, etc. Contractual-budgetary documentation of an institution (B4) comprises documents defining the constructive solution, the need for funds, personnel, materials, machinery, and equipment, transportation means, etc.

Social Block of Documentation Systems (Block C). An important place in the structure of institutional management documentation is occupied by the social block of documentation, which includes documentation on personnel management, documentation on pension provision, documentation on social issues and social protection, as well as classified and confidential documentation. Documentation on personnel management of the institution (C1) is a set of documents reflecting the personnel management status of the institution, starting from personnel needs planning, recruitment, selection, and relocation of personnel, certification, retraining, punishment, and awards, etc. Documentation on pension provision for institution employees (C2) is a documentation subsystem developed by the Pension Fund of Ukraine, which includes the necessary documents for pension provision to its employees, including pension application forms, salary certificates for pension calculation, records confirming the work experience of employees, guarantee letters for transferring funds to the Pension Fund authorities, applications for registration of the insurer in the e-services provision system, various calculations, income statements, etc. Documentation on labour, social issues, and social protection of institution employees (C3) are subsystems of documentation systems developed by relevant ministries, departments, and state funds, containing documents necessary for the enterprise, such as labour and wage accounting, social insurance for temporary incapacity due to industrial accidents and occupational diseases, documents for unemployment benefits, social protection of persons with

disabilities, documents related to the protection of citizens affected by the Chernobyl disaster, employment documents, etc. Classified and confidential documentation of the institution (C4) is a collection of documents containing information related to state secrets, the disclosure of which may harm the interests of the state. It regulates issues of compliance with the institution's: secrecy regime and confidentiality assurance during closed work, execution of duties by responsible persons for storing state or official secrets, ensuring confidentiality in maintaining a special register, etc. A significant portion of the listed management documentation of the institution is standardized according to the Classifier of Management Documentation (CMD) NK 010:2021 (2021) – a component of the national system for the classification and coding of technical-economic and social information.

Block of Regulatory and Legal Support Systems and Information Systems of the Institution (Block D). Quality management of institution functioning processes, preparation of organizational and managerial documents, compliance with current norms, standards, and rules, ensuring its life safety, implementation of information technologies, and application of information systems are impossible without proper regulatory and legal support of the institution with corresponding documentation, which has both infrastructure (common for all) and sectoral purposes. A special place in the specified block belongs to the subsystem of legal documentation of the institution (D1), which includes laws and by-laws, resolutions of the Verkhovna Rada, Cabinet of Ministers, and decrees of the President of Ukraine, orders, directives, decisions, and instructions of government agencies. The mentioned system can include documentation of specialized fields of law, documentation of legal fields adapted to other spheres (economic, civil law). The main task of the mentioned documentation is to organize legal work effectively, conducted by the legal service of the institution, whose activity is aimed at compliance with the requirements of current laws and regulatory acts, prevention of their violation, protection of its activities, and representation of interests in government bodies. Legal documentation of the institution reflects issues related to: settlement of disputes in the interests of parties; claims work related to breach of contractual obligations; litigation if issues are not settled on a voluntary basis; transfer of cases to courts, etc. The system of legal documentation also includes a set of documents of the patent and intellectual property sphere (documents on inventions, license agreements, plans for patenting inventions, expert opinions, etc.).

Documentation on standardization and certification of the institution (D2) is a system of documentation related to compliance with international, national, and industry standards, technical reports, enterprise standards, and technical conditions, including normative documents in the field of document management and

document management processes. Documentation on product certification includes certificates and declarations of conformity, test reports, or quality certificates, as well as a set of quality management documents aimed at improving the work of all its departments in accordance with the requirements of the international standard ISO 9000:2015 (2015). Documentation on labour protection in the institution (D3). The above-mentioned set of special documents on labour protection must be present at every enterprise, regardless of ownership form, number, and type of its activities. It is developed in accordance with the requirements of current regulatory acts in accordance with the staffing table of the institution and the types of work performed in full, and includes normative, organizational and managerial, reporting, and accounting documents. Thus, the regulatory documentation on labour protection in the institution consists of Laws of Ukraine No. 2694-XII (1992) and No. 717-V (2007), Labour Code of Ukraine (2023) and relevant regulatory documents. General safety requirements in the automotive industry, maintenance of its territory, structures, fuelling points, sanitary and domestic premises, equipment, devices, and tools, as well as carrying out maintenance and repair of vehicles, are contained in the relevant Rules of labour protection in automotive transport, approved by the Ministry of Emergency Situations of Ukraine (Order of the Ministry of Emergency Situations No. 964, 2012). Organizational and instructional documents on labour protection are developed at each enterprise in accordance with the Regulations on the Development of Instructions on Labour Protection, developed by the labour protection oversight committee of the Ministry of Labour and Social Policy (Order of the Ministry of Social Policy of Ukraine No. 526, 2017). Reporting and accounting documents reflect the state of work on safety measures. Medical documentation subsystem, which reflects the passage of pre-employment and periodic medical examinations in accordance with the current procedure for their conduct by employees of certain categories, approved by the Ministry of Health of Ukraine (Order of the Ministry of Health of Ukraine No. 246, 2007), and the relevant regulation "On Approval of the Regulation on the Medical Examination of Driver Candidates and Vehicle Drivers" (2013), approved by the above-mentioned ministry and the Ministry of Internal Affairs, which is reflected in the relevant documents.

Documentation on Fire Safety of the Institution (D4). At the national level, fire safety issues are regulated by the Code of the Civil Protection of Ukraine (2013), which defines the methods and means of its organization in entities of various forms of ownership and the powers of their leaders in critical situations. Regardless of the number of staff in the institution, the regulatory framework for regulating fire safety issues in it is the "Rules of Fire Safety in Ukraine" (2014), approved by the Ministry of Internal Affairs of Ukraine. In addition, there are industry-specific rules of fire safety, which, if necessary, are

developed and issued by central executive authorities. Thus, fire safety rules for enterprises and organizations of road transport in Ukraine are approved by the Order of the Ministry of Infrastructure of Ukraine (2015), which are mandatory coordinated with the State Emergency Service of Ukraine. Organizational and managerial documentation on fire safety may include: general-object instructions and guidelines for fire safety for each type of premises; evacuation plans from them; fire action procedures; orders appointing persons responsible for fire safety; orders on the introduction of fire safety regimes at the enterprise; declarations of compliance with the material and technical base of the enterprise with fire safety requirements; programs for conducting briefings and fire safety registration logs; logs of inspection and maintenance of fire extinguishers and fire alarms; protocols of checks of fire hydrants and hoses; certificates of completion of special fire safety training for responsible persons; protocols of insulation resistance measurements, etc. Documentation on Information Systems of the Institution (D5). Solving the main strategic and tactical tasks of the institution's activities, forecasting the prospects of its development requires the presence of appropriate automated information systems as sets of organizational and technical means for the transmission, distribution, presentation, storage, and processing of information, the purpose of the functioning of which is to meet the information needs of users, exchange information, apply modern document information processing tools, modern technologies of analytic-synthetic information processing. The listed issues require the establishment, adjustment, and organization of uninterrupted operation of information systems, work with which requires reflection in protocols of production tests, acceptance and delivery test reports, network operation logs, plans and schedules for the creation and periodic inspection of information systems, as well as in other registration and accounting documents, based on the needs of the organization.

Production (transport) documentation of the institution as a component of industry documentation. Let's take a closer look at the production (transport) documentation that exists within the institution and characterizes the specificity of the chosen research organization of the transport industry. Since the production process of an automotive enterprise includes main, auxiliary, and service productions, their documentation support is presented as a set of blocks of systems and subsystems of managerial and special documentation regarding the mentioned productions related to the transport industry.

The documentation block of the main production of the institution (E) is a set of interconnected documentation systems of the transportation service of the automotive enterprise (AE), which are maintained by its subdivisions: cargo, dispatch, accounting and control groups of employees, and the traffic safety group. Thus,

the documentation of the cargo group (E1) is a set of project-production, production-organizational, and informational (special) documents prepared by the transportation service in the sphere of AE services together with the planning and economic department based on data on cargo flows and the transport market. This documentation includes transport plans (monthly, quarterly, annual), schedules and routes of cargo transportation taking into account the maximum loading of vehicles, drafts of contracts with cargo shippers and consignees; logs of orders (applications) for cargo transportation and the use of vehicles, the shift-daily operational transportation plan, which is transmitted to the dispatch group, and so on.

The documentation of the dispatch group (E2) is production-organizational, production-operational, and reference documentation, which includes schedules for the dispatch of rolling stock to the line and return to the depot, shift-daily and operational transportation plans, logs of registration of vehicle entry and exit, waybills, technical certificates for vehicles, etc. The documentation of the accounting and control group (E3) is production-control documentation, which includes information on primary processing of waybills and goods-transport documents, information on operational accounting of the plan execution for transportation by customers and by cargo nomenclature. It can also be presented in terms of car fleets, crews, or individual drivers. Accounting and control information is recorded in vehicle operation cards, mileage records, tire mileage logs, fuel usage records, limit cards for spare parts, auxiliary equipment, material write-off acts, etc.

The documentation of the traffic safety group in the institution (E4) is road control documentation containing appropriate sets of organizational, regulatory, and reference-informational documents. For example, the set of organizational and regulatory documentation of the automotive institution includes the standard "Road Traffic Safety Management System", orders on the organization of "Traffic Safety Day" and measures to improve road traffic safety, acts on the results of checking the organization of work on road traffic safety of vehicles, safety and environmental safety certificates for vehicles, and permit documents, etc. The set of reference-information documentation includes: a journal of road traffic accidents (RTAs) registration; a journal of violations of traffic rules by drivers and road traffic accidents; a journal of driver training completion for those who have not worked for more than six months, or who are newly hired; journals of pre- and post-flight medical examinations of drivers, information on preventive vehicle inspections released to the line, etc.

The documentation block of auxiliary productions of the institution (F) is a set of official documents maintained by the technical service departments of the AE and relates to the organization of production processes to ensure the technical readiness of the rolling stock

primarily used in the main production, and includes a set of special documents of the production-technical department, chief mechanic's department, technical maintenance and current repair zone, production and auxiliary areas. The documentation of the production-technical department (F1) reflects the organization of work on the operation of vehicles, the creation and use of individual mechanisms, directions of automation and modernization of production processes, application of progressive methods and means, advanced technologies, etc. It includes the operational plan of all types of technical inspections (TI) and vehicle repairs, the operational plan-schedule for conducting TI-1 and TI-2, and, if necessary, the above-mentioned accounting and control documentation for each vehicle. The design documentation department includes technical tasks and proposals; sketch and technical projects and relevant working documentation, documentation on scientific and technical information, standardization and certification, as well as organization of patent and inventive work.

The documentation of the chief mechanic's department (F2) reflects the inspection of the technical condition of vehicles, their release and entry into the garage, inspection of the braking system, steering control, engine, wheels and tires, external lighting devices, and auxiliary equipment. Employees of the department maintain journals of vehicle release to the line and return from the line, acceptance and transfer of vehicles, registration of repair requests, transportation of vehicles to the repair zone, daily, one-time, or premature return, and prepare reports on headlight adjustment checks, control of the condition of car tires, etc. Documentation of production and auxiliary areas (F3) in technical maintenance and repair zones includes journals of technical inspections registration, accounting of TI and repair of machines and aggregates. If necessary, an act of transfer and acceptance of the vehicle is drawn up, or, in the case of providing services in the presence of the customer, a corresponding work order for their provision and an appropriate invoice is issued. In the case of individual production, the documentation includes route maps for processing parts for each order. The documentation of the garage unit (F4) of the enterprise is primarily the general plan (projected and actual), which is a graphical representation of its territory with all buildings, shops, repair workshops, ramps in open areas, repair pits, ramps, water bodies, water and lubricant tanks, fuel filling station, administrative and residential buildings, communications, access roads, etc.

The documentation block of service productions (G) is a set of related service documents reflecting the provision of basic and auxiliary productions of the AE with energy resources, material and technical supply, availability of wheels, tires, spare parts, material products, and lubricants, quality of technical maintenance and repair, marketing activities, level of training and retraining of employees, condition of premises and enterprise territory, if necessary, housing and communal

services, etc. The energy management documentation (G1) is the basis for organizing the quality provision of basic and auxiliary productions of the AE with energy resources and represents calculations of the planned energy balance, the development of which is carried out to determine the enterprise's needs for electricity. Power, technological, and production-economic balance sheets are distinguished. The energy management documentation also includes acts and schedules of power supply connection and disconnection, distribution of energy resources, protocols of production tests and commissioning, plans for periodic equipment inspection and repair work, consolidated estimates of expenses for servicing and repairing energy equipment. Additionally, energy management documentation includes acts and schedules of power supply connection and disconnection, distribution of energy resources, protocols of production tests and commissioning, plans for periodic equipment inspection and repair work, etc.

The documentation of the procurement department (G2) is an important and integral component of meeting the needs of the AE in supplying material and technical resources for primary and auxiliary production. The excellence of the company's functioning can be discussed only if it timely receives the necessary resources and delivers them in the required quantity and assortment. Only well-organized work of the department allows the enterprise to maintain the necessary range of goods, regulate the volumes of stock, their structure, and effectively influence the socio-economic efficiency of the company's activities. The quality of documentation preparation will determine the perfection of the supply process organization, the completeness and stability of the assortment, stock volumes, the speed of goods turnover, and other indicators reflecting the level of financial and economic activity of the enterprise.

Documentation of warehouse management (G3) of the AE reflects the functioning of the warehouse economy regarding the preservation of stocks of raw materials, materials, and equipment of the enterprise, documenting their movement and write-off. Materials, spare parts, equipment entering the warehouse undergo quantitative and qualitative documentation upon receipt. The records of receipt and consumption of material stocks are kept in warehouse accounting cards, and the basis for their completion is limit-issue cards for equipment and spare parts write-off, material consumption statements, write-off acts, invoices, and other primary documentation. Based on the primary documentation, the warehouse management employee compiles a report on the movement of material values, which is then transferred to the company's accounting department.

Documentation of the technical control service (G4). At the stage of releasing the vehicle to the line, technical control consists of checking its technical condition in accordance with the current Order of the Ministry of Transport and Communications of Ukraine No. 974 (2008),

approved by the Ministry of Transport and Communications of Ukraine in accordance with Article 23 of the Law of Ukraine No. 2344-III (2001). Checks of vehicles by carriers are carried out shift-wise (for all categories), quarterly (for passenger vehicles), and every six months (for trucks), and the absence of operational documentation does not exempt the carrier from performing the check. The schedule for checking the technical condition of vehicles is approved by the head of the carrier's motor transport enterprise. A register of operations for checking the technical condition and a register of checking completeness and control over unauthorized changes in the design and completeness of the vehicle are also kept.

Documentation of the marketing service (G5). It is traditional for modern AEs to organize a marketing service as part of the enterprise. At the same time, the process of organizing marketing activities depends on the volume of AE transportation, and if large enterprises can include marketing services, for small enterprises, creating such services can significantly increase production costs. Therefore, principles of project organization can be applied at such enterprises by selecting employees who are closer to the problem and are the best experts to solve it. When solving marketing tasks, employees involved in their execution from other departments (transportation department, production-technical department, financial group, or supply group) return to their direct functional duties.

The marketing department utilizes documentation regarding the core strategic objectives; the company's goals, approved marketing budget; projects of transportation plans and vehicle utilization, etc., and, in turn, prepares and submits documentation regarding the company's market position, analysis of revenues and expenses, transportation and vehicle utilization, evaluation of competitors' activities, prepares a budget performance report, market trends by product groups, makes pricing proposals, provides forecasts of the company's activities, and so on. Documentation of the educational department (G6). Modern scientific and technological progress, the transition to an information society requires constantly increasing the level of training of its employees, multiplying their information culture, acquainting them with the latest achievements and technologies in the field, organizing training seminars, short-term courses, training and retraining of vehicle drivers, and so on.

These issues are usually addressed by the educational department, which develops and maintains educational-organizational, program-methodological, teaching (educational), educational-research, educational-support, and educational-control documentation in accordance with the current procedure, approved by the Resolution of the Cabinet of Ministers of Ukraine No. 487 (2009).

Administrative and economic documentation (G7). The main task of the specified documentation is to reflect the economic problems of the institution's activities and their qualified solution, including monitoring the proper condition of lighting and electricity supply systems, ven-

tilation and heating systems, water disposal and water supply, fire and sanitary-technical condition of premises, property and equipment storage of the institution. Administrative and economic documentation includes: annual procurement plans by AE departments; plans for property restoration and renewal, its maintenance; financial documents regarding the remuneration of the management apparatus; contracts for premises and communications repair, technical maintenance, equipment and machinery repair; performance certificates; inventory accounting documents; relevant statistical reporting, etc.

Residential and communal documentation (G8) is maintained if the AE's own housing (house, dormitory, etc.) is on the balance sheet. The main regulatory document is the Law of Ukraine No. 2189-VII (2017). Also required is appropriate production-applied documentation regarding housing operation, including contracts for major repairs, certificates of repair work performance, acceptance and handover of premises and buildings, etc. Depending on the specifics of the institution's activities, other types of documentation may also be maintained, such as repair and construction documentation, documentation on the activities of trade unions and public organizations, sociological documentation, etc. The consolidated scheme of documentation systems of official origin of the motor transport institution is presented in Figure 1.

The blocks of infrastructure and production (in this case, intra-transport) documentation presented in Figure above represent the documentary resource of a motor transport institution. The basis of its infrastructure documentation consists of blocks of managerial documentation (general, economic, and social documentation), which can be found in practically any organization, regardless of its industry affiliation.

A significant portion of managerial documentation is standardized according to the National Classifier of Managerial Documentation NC 010:2021 (2021), with the developers of the specified documentation in the Unified Documentation Systems Classifier being executive bodies: ministries of economy and finance, as well as social insurance funds: for unemployment and temporary disability, insurance against accidents at work and occupational diseases, and social protection of disabled persons. In most classes, except for class 01, which contains managerial documentation of organizational and directive nature, the Unified Documentation Systems Classifier lists document forms, including forms of accounting, financial reporting, reporting to banking institutions and funds, relating to information of public nature for general management purposes, control over the state of affairs in the sectors of the economy, and the adoption of balanced management and policy decisions. From this point of view, the mentioned documentation is indeed managerial, and the use of standardized document forms allows for an increase in the level of documentary support for government management as a whole.

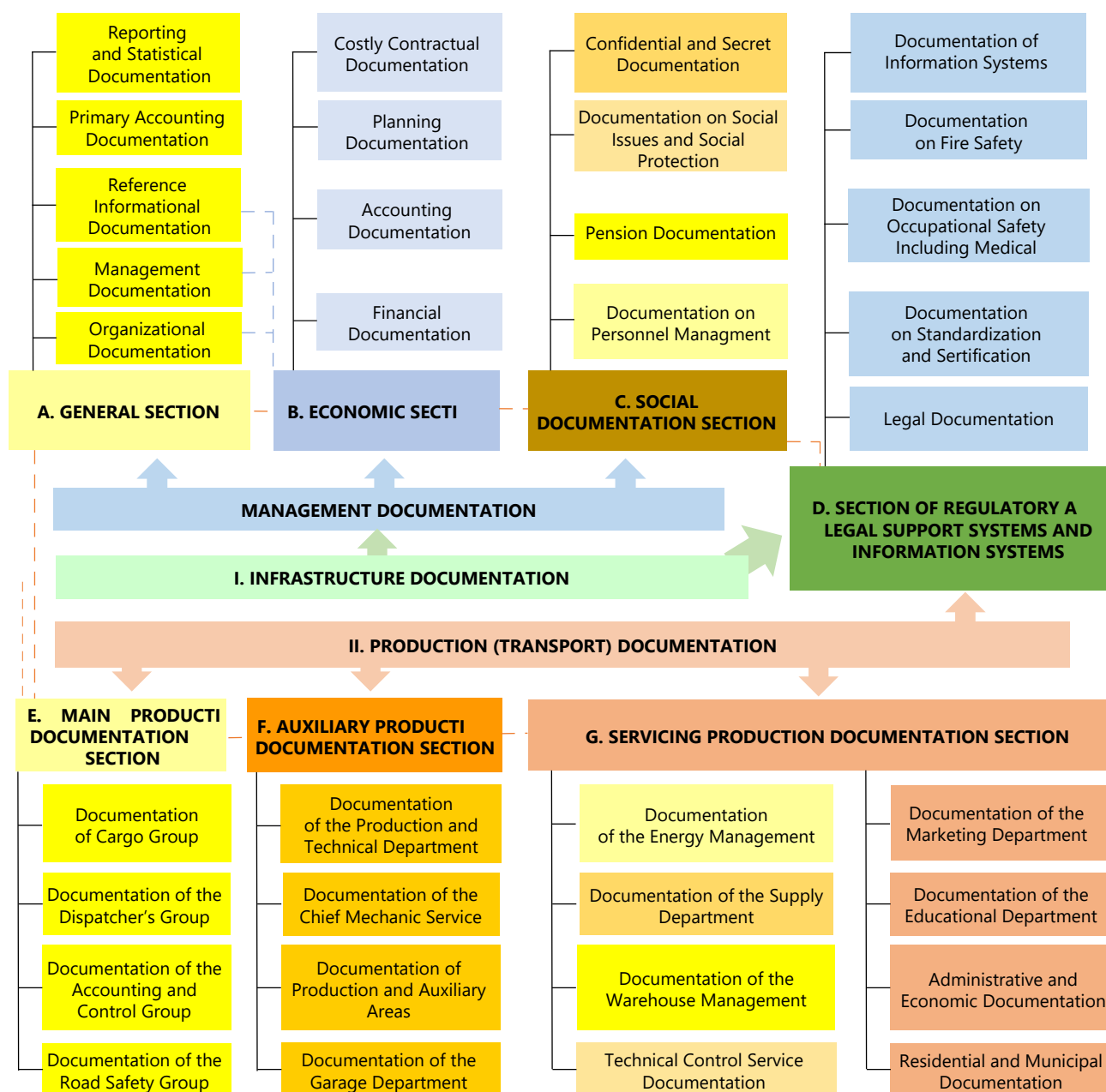


Figure 1. Components of documentation systems of a motor transport institution

Source: compiled by the authors of this study

The block of normative-legal documentation and information systems has both infrastructure (common for all institutions, regardless of departmental subordination) and special purposes since normative-legal documentation includes laws and by-laws and normative documents important for both general management purposes of the management organization and for the main production activities of the institution (depending on the industry). The blocks of documentation systems for main, auxiliary, and service production reflect the peculiarities of documentary support for the management of a motor transport institution but can, in a generalized form, be present in transport institutions of land (railway), water, and air transport. The ordered interaction

and integrity of the functioning of the components of documentation systems should be understood as a perfect material and organizational-legal basis for working with information, which is a prerequisite for proper information support for organizational management, ensures reliable and fast access to documented information, promotes the increase of competence, communication of employees of different levels of subordination, and, overall, corporate culture.

In works dedicated to the aforementioned issue, a classification analysis of individual documentation systems was conducted. Scholars provided a characterization of their main types, explored the varieties of documents within these systems, discussed the requirements

for their creation and organization of functioning, analysed the percentage of each type based on specific content and functional purpose within the overall documentation system, and so on. However, a comprehensive analysis of documentation systems at the institution level, the study of infrastructure and production documentation, their subsystems, and the establishment of their connection with industry-specific documentation systems were not carried out. Within the framework of this study, the discussion of documentation support issues for the organization continues, reflecting the level of its information culture, and a significant scientific potential has been developed (conference abstracts, articles, manuals, monographs), which reflect approaches to the optimal creation of documented information, its analytical processing, management of documentation processes, identification of necessary methods and means for this purpose, and the construction of management and industry-specific documentation systems, as elucidated in the publications by Yu. Palekha (2020; 2022). The issues of building documentation systems at the level of the country's economic sectors were discussed, whereas this publication is devoted to building documentation systems at the institutional level, which is a continuation of scientific explorations in the field of improving the organization's information culture.

One can agree with the conclusions of A. Curry & C. Moore (2003), who present information culture as an organizational value that contributes to achieving tactical and strategic success for the institution, as well as the findings of O. Gillian & F. Foscari, (2019), and O. Gillian (2008), who interpret the organization's information culture as a complex of knowledge and skills that serve the application of relevant methods and means for managing documentation processes. The correlation established by J.L. Gesmundo *et al.* (2022) between professional performance (in terms of service quality and timeliness) of document-related work processes (from their creation, backup, file recovery to document movement monitoring, preservation control) and working conditions, age, gender, tenure, and positions held by institution employees deserves attention.

The authors agree with the conclusions of J. Spooner (2021) and S. Balagobei (2019) that information culture, knowledge, and staff abilities to work with documented information generated during their interaction, their ability to process and manage documentation processes thoroughly, and the institution's acquired means and equipment, which they use, are crucial for effectively providing services and enhancing the organization's corporate culture. A.M. Shelestova's proposals (2011) for the development of a prospective model ("essence – relationship") for the functioning of institution documentation systems under the conditions of implementing advanced information and communication technologies are also rational.

Agreement can also be reached and extended to this study with the conclusions made by Associate Professor K.I. Klymova (2021), that the constructed documentation systems are not static, as their composition may constantly change due to the creation of new types and the removal from use of old (archaic) documents, as well as due to the replenishment or removal from the document system as a result of the institution's annual assessment of their value. Also noted is the fact that special documentation forming systems perform specific functions, among which legal and informational functions are common. The factors influencing the construction of institution documentation systems, as noted by the researcher, include: the activities of state institutions, developers of specialized documentation systems; legislative and departmental regulatory framework for document work; the nature of document work in the institution, the results of scientific research that have contributed to improving the regulatory framework for building documentation systems.

The dissertation research conducted by K.S. Kornychuk (2019) deserves attention for its detailed analysis of the industry-specific features of document flows and document circulation systems of transport enterprises, as well as for identifying the main groups of industry documentation when forming electronic document circulation systems in production, particularly in the transportation sector. Based on this analysis, the author identifies problems and shortcomings in the implementation of electronic document circulation systems in the practice of transportation complex enterprises, particularly in automotive enterprises. The valid recommendations of this researcher regarding the allocation of documentation subsystems in accordance with the provision of transport and logistics services, where the presence of these documents, in the vast majority of cases, is stipulated by current legislative acts, were taken into account during the development of the aforementioned documentation system.

The establishment of a typical composition and form of the terminological structure of documents that record the performance of similar functions, and the achievement of informational compatibility of different documentation systems, is possible through document standardization, as emphasized in her dissertation research on the study of documentation systems in the trade sector by Prof. O. Shevchenko (2016), with which one can also agree.

Thus, the proposed blocks of systems and subsystems of infrastructure and production documentation of the institution reflect its functioning in the transportation sector and constitute a unified documentation system that ensures effective management and stable development in the future, as well as organized interaction of these systems, which can be supplemented or modified in case of production necessity.

Conclusions

It has been established that the systems and types of documentation of institution units are interconnected and constitute its general document resource; the documentation that forms the systems performs certain functions, among which legal and informational are common; the genetic connections between documents of each type of documentation are determined by the sphere of their formation and the specificity of the activity of the respective unit. Each of the considered documentation systems is characterized not only by interrelation and mutual conditioning but also often by mutual penetration, although their composition may change both due to the creation of new types and the removal of obsolete ones, as well as due to the addition or removal of documents from the system as a result of the work of the expert-review commission to determine their value.

The basis of the institutional infrastructure documentation consists of blocks of management documentation, which can exist practically in any organization, regardless of its industry affiliation, and a significant part of them, according to national regulatory documents, is standardized. The block of normative legal documentation systems and information systems has both infrastructural and special purpose since regulatory legal documentation includes laws and by-laws and normative documents important both for general management purposes and for the main production activities of the institution depending on the industry. The main components of the regulatory framework for forming blocks of transport institution documentation systems should be based on existing legislative acts and basic standards that establish common requirements for the creation and processing of official documents, serving as legal grounds for managing documentation processes in it. Blocks of documentation systems of primary, auxiliary, and service production reflect the features and perfection of documentation support for managing the transport institution regardless of the type of transport. Production documentation

systems are integrated with management documentation systems, and in the case of service necessity, documentation from one unit is supplemented with documentation from others, and when compiling the institution's annual report, all documented information is consolidated. Understanding the components of the organization's documentation systems, their interrelations, their purposes, using the example of an automotive institution, demonstrates the possibility of constructing a clear information model of its documentation support.

As a result of the conducted research, it has been established that ensuring units with qualitatively prepared and optimally defined documentation systems and subsystems, the knowledge of their personnel of the regulatory framework and their interrelations, mastery of modern information technologies, is the main basis for further implementation of automated document management, successful execution of the institution's main functional tasks, and raising its informational and corporate culture. The prospects for future research on the information culture of the management subject should include substantiating the theoretical foundations of building perfect information management support for the organization. It is also necessary to continue scientific research on the application of the most rational methods of working with documented information in the institution's units, establishing unified principles of processing documented information in its units regardless of departmental subordination.

Acknowledgements

The authors express their gratitude to the Head of the Department of Social Communications, Records Management, and Information Activities at Hryhorii Skovoroda University in Pereiaslav, Associate Professor Alla Zlenko, for valuable recommendations and assistance in preparing the article.

Conflict of Interest

None.

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Системи документації автотранспортної установи як показник корпоративної інформаційної субкультури

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Анотація. За сучасних умов переходу до інформаційного суспільства, виникає необхідність розбудови відповідної інформаційної культури суб'єкта господарювання, систематизації основних засад документаційного забезпечення управління ним, вираженого дослідження систем документації, включаючи їх взаємозв'язок, для подальшого впровадження інформаційних технологій, застосуванню систем електронного документообігу. Мета роботи полягає в комплексній розвідці систем інфраструктурної та галузевої документації установи, чіткій побудові блоків систем документації та впорядкуванні їх складових, досконале знання й розуміння яких сприяє застосуванню прогресивних засад управління нею, підвищенню рівня її корпоративної культури. При проведенні дослідження були застосовані системний та соціокомунікативний підходи, що дало можливість обґрунтувати поділ на блоки систем документації, встановити комунікаційні зв'язки між інфраструктурною, нормативно-правовою та виробничою документацією й визначити роль кожної з її складових. Застосування методу сходження від абстрактного до конкретного сприяло трансформації загальних питань документаційного забезпечення суб'єкта господарювання до побудови конкретних систем документації транспортної установи. В статті репрезентовано авторський погляд на побудову систем інфраструктурної та виробничої (внутрішньо-транспортної) документації, що мають місце в документаційному забезпеченні управління установою на прикладі автотранспортного підприємства. Інфраструктурна документація подана, як функціональна для забезпечення управління всіма напрямками діяльності установи, що містить блоки систем управлінської документації (загальний, економічний блоки та блок соціальної документації). Розкрито призначення кожної з систем виробничої документації, їх складові та взаємозв'язок між ними. Виокремлено блок документації нормативно-правового та інформаційного забезпечення, що слугує як загальним цілям управління організацією так і кожному з її напрямів діяльності. В даному дослідженні запропонована комплексна система документації організації, як показник рівня її інформаційної культури, складник корпоративної культури, що характеризує ступінь спільних досягнень працівників у можливих видах роботи з керування документацією, створенні інформаційних продуктів та послуг. Результати дослідження можуть мати практичне застосування в усіх транспортних організаціях при впровадженні та застосуванні новітніх систем і технологій роботи з документованою інформацією

Ключові слова: документно-інформаційна база; галузь; класифікаційний аналіз; основне виробництво; допоміжне та обслуговувальне виробництво



Ukrainian and international experience of formation of information competencies by means of library practices

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Abstract. The relevance of the research problem is explained by active digitization, which places modern libraries tasks to apply new information and communication technologies in their work to increase the level of information competencies of employees and readers. The purpose of the article is to determine the main forms and methods of forming information competencies through library practices in the context of Ukrainian and international experience. The research methodology is based on a combination of source analysis, comparative analysis, and systematic and logical methods of scientific research. As a result of the study, it was noted that the concept of information literacy encompasses a set of technological skills that contribute to effective information search and processing, enhance the ability to interact effectively in the media space, understanding the essence of media texts, and the ability to protect against negative media influences. Based on the analysis of the legislative framework, the content of the concepts of "digital competence" and "media competence", which are components of information competence, was determined. The article defines the specifics of forms and methods of increasing the level of information competencies in public and academic libraries. In public libraries, work on increasing the level of information competencies includes skills and abilities to use information and communication technologies; search for information on the Internet; safe and responsible work in the virtual space; critical processing of information obtained from media resources. In academic libraries, in addition to the above, work is aimed at expanding knowledge services, strengthening interaction between teachers, students, and librarians for the effective conduct of innovative research and the quality assimilation of new knowledge. For librarians as knowledge managers, increasing the level of information competencies encompasses a complex of technological, information legal, methodological, moral-ethical knowledge with the involvement of security components. The practical significance of the research lies in the possibility of more effectively using the analyzed practices of forming information competencies by Ukrainian libraries

Keywords: information literacy; digital competencies; media competencies; information security; public libraries; academic libraries

Introduction

The beginning of the twenty-first century is marked by the emergence of the digital era, which has shaped the phenomenon of the "digital human" and has presented libraries with new challenges – the need to enhance the

level of digital competencies among library staff, digitization of information resources, overcoming digital inequality in access to information resources and technologies, and opportunities for their use. The widespread

Suggested Citation:

Lomachynskyi, B. (2023). Ukrainian and international experience of formation of information competencies by means of library practices. *Society. Document. Communication*, 8(3), 22-33. doi: 10.69587/sdc/3.2023.22.



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use of the Internet has created a new reality of a kind of informational "self-service", which affects the change in the forms and methods of library work, with active orientation towards service in the virtual space involving digital technologies. This necessitates the implementation of a set of measures to enhance the level of information competencies of library staff for quality service to the community of readers, including "virtual" readers.

To disclose the essence of the mentioned problem, it is worth noting the scientific research by M. Deja *et al.* (2021), who focused on the features of implementing information culture in the space of the university library in their studies. The authors thoroughly analyze the problem of forming information competencies in university libraries and note that the combination of information and digital literacy influences the intention to use digital technologies for learning, and overall, information literacy positively affects the intention to use digital tools. The importance of information literacy for librarians is emphasized by T.S. Nicolas-Rocca & R.J. Burkhard (2019). Based on the analysis of libraries in the United States, scholars assess the impact of knowledge transfer as a means of enhancing information security in libraries. The results of the study indicate that library workers who have completed a cybersecurity course understand that they are obligated to protect the personal information of library visitors.

For modern libraries in the global context, the problem of digitizing library collections is of particular importance. In particular, N. Barbuti (2021) emphasizes the importance of digitizing libraries for preserving cultural heritage. However, digitization of library collections poses a problem of information security for their quality preservation, as well as the level of information competencies of librarians themselves as knowledge managers. A. Khan *et al.* (2021) focus their attention on analyzing information security in university libraries in Pakistan. Based on a survey of 190 professional librarians in Pakistan, the authors provide practical recommendations for enhancing the level of information competencies of librarians, including their level of information security.

The issue of security management in library management has become the focus of attention for V. Singh & M. Margam (2018), who analyze the issue of information security in Indian university libraries. The authors note that information competencies of librarians should include information security management in the context of library management, namely – the control means that librarians need to implement to protect their information assets from all potential threats, to ensure the confidentiality, integrity, and availability of their information resources, as well as to help identify and reduce critical risks.

The role of media literacy in modern library and information activities is revealed in the research by T. Granchak (2018). The author analyzes the challenges that Ukrainian libraries faced due to Russian aggression, in the context of the feasibility of preserving information

of openly manipulative nature, or regarding the problem of systematizing library collections – by genre or thematic principle (which would enable a more qualitative presentation of the most relevant resources on Ukrainian history and culture for readers), as well as the relationship between preserving the principle of freedom of speech and ensuring information security. In these conditions, adherence to the librarian's code of ethics acquires special urgency, among the key positions of which the author highlights the principles of intellectual and information freedom, as well as adherence to neutrality, personal honesty, and professional skills.

The research by I. Lomachynska & V. Lomachynskyi (2021; 2022) is aimed at analyzing the knowledge management culture in university libraries, noting that the digitization of educational resources is a key factor for effective knowledge management in the university environment. The possibility of digitally rethinking this process largely depends on a clear organizational strategy oriented towards innovation. The authors emphasize the role of librarians in expanding scientific and research activities in modern universities through consultancy, practice, training; the important role of librarians in facilitating market analytics to improve the professional competencies of graduates.

O. Ronges (2021) is working on the issue of levels of digital and media competency, which the author presents as components of communicative competence, enabling orientation in the world of internet technologies. These competencies are associated with logical and critical thinking, as well as information management skills. The development of these aspects is identified as a key goal for achieving the status of a full-fledged and reliable digital state. In the research findings, the author emphasizes the need for citizens of Ukraine to determine their level of digital competencies using available testing methods, as this will contribute to the further formation of the most demanded skills in the digital era.

S. Khrushch (2022) explores the innovative media space of the modern library based on the principle of "library humanism", which is implemented in the field of professional library activities. Among the relevant directions of library activities for the digital age, the author highlights consulting services for overcoming digital inequality and the implementation of digital education for citizens, which requires competent consultant specialists and the availability of digital learning tools. In the research results, the author emphasizes the need to adapt the humanistic function of the library to innovative transformations based on axiological orientations of library functioning.

Thus, the accumulated Ukrainian and international scientific experience makes it possible to define the research goal – determining the main forms and methods of forming information competencies through library practices. The goal involves solving the following tasks: clarifying the content of digital and media competencies

in international and national regulatory documents; determining the mechanisms and educational components of information security as a component of ensuring information competencies; clarification of practical aspects of increasing the level of information competencies in the system of public and academic libraries.

Materials and Methods

The specified work utilized a range of interdisciplinary research methods. The heuristic method was employed in the process of sourcing the research's theoretical and empirical foundation. Further theoretical analysis of literature on the research topic allowed for the identification of key trends in understanding fundamental concepts, including "digital competency", "information literacy", "media literacy", and others. To delineate the scope and substantive content of these and other concepts and their critiques, the formal-logical method was applied. A significant research method was the systemic approach, which was employed to better understand the essence of contemporary library activity as a holistic information-communication system. Within this method, the role of libraries in preserving the country's cultural heritage in terms of documentary resources, particularly through modern digital technologies, was analyzed. The application of the systemic method also theoretically substantiated the importance of libraries as agents of knowledge and skills dissemination in the field of information security, the integration of new technologies in the university environment, and the high-level provision of information literacy to the population. Another interdisciplinary research method utilized was comparative analysis. This method facilitated the identification of the specificity of forms and methods for increasing information literacy in library settings and the determination of the most promising existing approaches and practices used globally in the field of digitizing information service provision. Alongside this, the specified method was employed to compare various theoretical concepts, propositions, and interpretations present in contemporary literature regarding the digitalization of the educational sphere and academic environment. The method of classification and typologization allowed for the identification of the leading tasks of the modern library and the classification of knowledge management culture organization directions in the modern higher education system.

The research materials included various types of sources such as legislative acts, official documents, and notifications from Ukrainian and EU government bodies, reports from international organizations, and more. Specifically, in 2005, UNESCO presented the main directions for the development of an information society as a knowledge society (UNESCO, 2005), which subsequently formed the basic criteria for information and media literacy – critical perception of information, free access to media and information literacy, adherence to the right

of access to information, media and information literacy as a continuous and dynamic process (Five Laws of Media..., 2018). The European Commission proposed a digital education action plan, based on which the creation of a European digital education content system is planned, incorporating technological, educational, ethical, and security components (European Commission, 2020). The importance of information literacy for learning and self-development is emphasized in the Law of Ukraine No. 38-39 "On Education" (2017). The Concept of Development of Digital Competencies (2021) highlights a specific plan for their practical implementation.

Results and Discussion

Digital and media components of information competencies. In the UNESCO World Report "Towards Knowledge Societies", UNESCO experts expressed the view that knowledge is a social resource that should be universally accessible (UNESCO, 2005). The organization aims to promote social integration and support social activity for all. Therefore, as long as global society lacks equal opportunities in accessing information and critically evaluating it, as well as in analyzing, sorting, and contributing to the common knowledge base, information will remain a collection of obscure facts. Of particular importance is the ability to navigate information flows, cognitive abilities, and critical thinking (Onishchenko, 2012).

In EU countries, the Digital Education Action Plan 2021-2027 was adopted (2021). Among its main directions are a set of measures to create an effective digital educational ecosystem, including infrastructure for providing communication tools and digital equipment; the ability to organize effective planning and development of digital potential; the formation of educational and teaching staff possessing a set of digital competencies; high-quality content, as well as secure platforms and convenient tools ensuring privacy and ethical standards. Also of great importance is the control of the quality level of digital skills and competencies that meet the requirements of the digitization era, namely the formation of key skills for working in the digital environment and competencies from an early age: digital literacy, including the recognition of disinformation and information overload management; computational education; increasing the number of professionals in the field of digital technologies (European Commission, 2021).

Under these conditions, the library community faces the challenge of creating new conditions for interaction with society, aimed at increasing the level of information culture, creating a safe environment for knowledge acquisition, and overcoming the digital divide. Libraries play a key role in continually updating the information resources and skills necessary for effective professional and personal self-realization, public participation, and personal management. In global scholarly discourse, there is an active debate about the content, forms, and



methods of library work in the context of digital transformation. Overall, the problematic field for analysis encompasses children's, academic, and public libraries, which pursue different goals and develop unique approaches tailored to the age and professional needs of the reading audience.

Digital literacy skills in the twenty-first century are a manifestation of success, citizens' readiness for change, and their full participation in public life. I. McShane (2011) distinguishes between the concepts of "digital literacy" and "information literacy" as a transition from information consumption to production and culture, from modes of "reading-only" to "reading-writing". The author proposes to consider library activities in the context of the concept of "participation culture" – a culture with relatively low barriers to artistic self-expression and civic participation, strong support for creating and exchanging works, and a kind of informal mentoring through which experienced participants pass on knowledge to newcomers. Thus, the expanded use of the Internet in cultural, commercial, and government institutions has transformed the digital divide into a "participation divide," which concerns not so much access issues as opportunities for engagement in participation culture.

The development of Internet technologies has led to changes in the field of information competencies and has also contributed to the evolution of digital competencies. They are often grouped into a triad with information literacy and media literacy. Digital competencies encompass a wide range of skills, such as using, filtering, evaluating, creating, programming, and exchanging digital content. In other words, it is a specific set of skills and competencies necessary for effective searching and processing of information in computerized form (Deja *et al.*, 2021).

In the Ukrainian normative and legal field, information competencies encompass media and digital competencies. Based on the decisions of UNESCO and IFLA (The International Federation of Library Associations and Institutions), media literacy and information literacy have been unified into a single concept – media and information literacy (Five Laws of Media..., 2018). Information competencies can be described as a complex of knowledge, skills, and abilities necessary for understanding the essence of information and effectively mastering its search, evaluation, organization, and ethical use. This new formulation is introduced in the revised Concept of Media Education Implementation in Ukraine (Concept of implementation..., 2016). "Media competence" describes the level of media culture that enables an individual to understand the socio-cultural, economic, and political context of media functioning. It indicates the ability of an individual not only to be a recipient and transmitter of media-cultural values, tastes, and standards but also to effectively interact with the media space, create new elements of media culture in modern society, and demonstrate active citizenship. Components of media competence include creative

critical thinking, communicativeness, positive motivation, reflection, and value-based perceptions of media usage. S. Khrushch (2022) suggests defining the innovative media space of a modern library as a complex of technical, technological, and software tools that arise in the process of digital transformations in the library. This complex is aimed at addressing the informational and socio-communicative needs of citizens, determined by their professional and civic activities, education, leisure, daily life, tasks of personal development, and interaction.

In 2014, the Ukrainian Press Academy began cooperation with libraries in the field of media education and media literacy (Libraries form media-literate personalities..., 2014). The realization that the modern library has a mission to assist its readers in competent consumption of various information in mass media, including adults, youth, and even the youngest, became the basis for cooperation between the Ukrainian Press Academy and libraries in the field of media education and media literacy. This is a response to the challenges of the present, where users need not only to effectively consume information but also to create their own media products. To increase the level of information culture among users, facilitate information search, and ensure communication with a remote audience, library specialists actively use virtual reference services to answer bibliographic questions and implement multimedia services such as virtual tours, galleries, educational video courses and lectures, and organizing video conferences. In this context, the study of the experience of libraries in presenting relevant information in a balanced way, aimed at impartial informing about socially controversial events, ensuring adherence to the principle of impartiality, while at the same time not excluding the activation of certain topics and issues important for national memory, is worthy of attention (Granchak, 2018).

In the Concept of Development of Digital Competences, "digital competence" is defined as a dynamic combination of knowledge, skills, ways of thinking, views, and other personal qualities in the field of information and communication technologies. This determines the individual's ability to socialize successfully, carry out professional and/or further educational activities using such technologies (Concept of development of digital competences, 2021). The Law of Ukraine No. 2145-VIII (2017) recognizes information and communication competence as one of the key competencies necessary for every modern person for successful life. With the approval of the new Concept of Development of Digital Competences, the concept of "digital competences" as a dynamic combination of knowledge, skills, ways of thinking, views in the field of information and communication technologies, which determines the individual's ability to carry out professional and educational activities using digital technologies, is actively spreading in the Ukrainian scientific space (Order of the Cabinet of Ministers of Ukraine No. 167-2021-p, 2021). It is worth noting that it is

more expedient to understand "information competency" as a broader concept than "digital competency". The information competency of a librarian involves mastering a complex of analytical competencies for successful knowledge management, digital competencies (confident, critical, and responsible use of digital technologies for successful professional activities and self-realization), media competencies (critical thinking regarding media texts), as well as understanding the constant improvement of information security skills and legal knowledge.

The transition from an analog to a digital paradigm in the work of Ukrainian libraries is characterized by a shift from processes of forming local information environments to creating a global media space. This also manifests in the transition from proprietary closed infrastructure to utilizing the potential of the global digital space. Ukrainian libraries already have significant experience in teaching computer literacy and working with the internet for their users. In particular, since 2009, public libraries that have joined the project of the Ukrainian Library Association have operated Citizens' Access Points to Official Information. Here, librarians provide training and assistance to community residents in using websites and services of state institutions. Analyzing the state of digitization of libraries at that time, O. Marjina (2012) proposed a strategy for developing a new communication environment for libraries. This strategy includes a shift in activity orientation towards the media environment, focusing on content creation and researching users' information needs. It also proposes the adoption of a new, more user-friendly library image that reflects real people, as well as encouraging user participation in library web projects through comments, constructive criticism, and other means. Additionally, the use of social media marketing technologies, social forms of cooperation, exchange, and self-organization to support and promote communication with users is recommended.

Considering societal demands and preferences, modern Ukrainian libraries have become key elements of the Digital Education Hubs network – spaces where everyone can learn digital literacy skills, gain free access to the Diia platform. The NGO Ukrainian Library Association and the Ministry of Digital Transformation of Ukraine have started joint activities within the project "Diia. Digital Education" and launched a national campaign on digital literacy "Be Up-to-Date!" (Ukrainian Library Association, 2020).

The best way to assess one's digital literacy is through the Digigram – a nationwide test of digital literacy (Press Office, 2020). Using the Digital Competence Wheel allows for an understanding of the wide range of necessary skills in the digital era. Digigram serves as a tool for checking current knowledge and skills in operating systems. Moreover, specific practical questions regarding knowledge and mastery of digital tools provide an objective understanding of real competencies at the moment (Rongers, 2021). Thus, based on the analysis of Ukrainian and global experience, it is possible to assert that in-

formation competencies encompass digital and media competencies, with important components being the ability to effectively work with information arrays both in traditional and virtual formats, as well as possessing critical thinking skills in consuming information products.

The role of public libraries in shaping information competencies.

A special role in shaping information competencies belongs to public libraries. C. Sidhartha *et al.* (2020) consider libraries as archetypal knowledge repositories. In this sense, librarians could be called knowledge managers, as they systematically manage the information available in the library so that the necessary information is accessible to knowledge seekers on demand, saving time for readers and increasing the efficiency of library work. As an organization focused on education, the main role of the public library lies in supporting the education of users, and in this sense, public libraries play an important role in democratic society – in defending freedom of speech and personal freedom, the right to education and self-education. Public libraries are endowed with the ability to serve the community in disseminating knowledge, providing access to information, removing barriers to learning, and also help cultivate a reading culture by engaging readers from all walks of society.

The Covid-19 pandemic has been a powerful challenge for library activities in accelerating the virtualization of library services: organizing virtual exhibitions and other learning tools, promoting their digital content, which can be used to support education, conducting weekly online concerts, providing free e-books, highlighting content aimed at learning new skills to move literacy programming online. The Chartered Institute of Library and Information Professionals (CILIP) (2020) launched its National Shelf Service, created "book walks" with descriptions of historical sites to encourage people to read and walk, stay connected with their users, and even conduct online arts projects, literary festivals. This includes creating new programs with freely accessible content, developing new educational materials for users to help them make the most of these learning opportunities, best use available digital tools, as well as virtual information literacy training.

Library professionals specialize in identifying, selecting, obtaining, processing, organizing, and disseminating information among users, thus managing the entire system of human knowledge. The main function of library staff is to manage human knowledge by collecting, processing, preserving, and managing information resources. The quality of library workers' work, according to D. Oguiche *et al.* (2017), will depend on several factors, including the acquisition of relevant skills, experience, educational ability, and self-education. Challenges posed by globalization to the library service system have greatly spurred the need for initiatives and programs to increase management potential.

The introduction of new technologies in library services, rapid growth of new knowledge, changes in trends in library services, communication media, subject knowledge are among the main factors that will require an increase in the potential of library and information professionals. With the paradigm shift in users' use of internet resources over material carriers of information, library professionals need technological skills to thoroughly search for correct information in a specific database, using a logical and analytical approach, and provide this information to users promptly. They must be able to assist users through retrospective searching, provide ready reference services, bibliographic services, as well as ensure selective dissemination of information services, etc. A librarian working in a web environment also requires skills in document classification and cataloging, indexing and abstracting methods, etc. (Oguche *et al.*, 2017). Accordingly, a library professional acts as a kind of intermediary between readers as information users and information resources, requiring mastery of relevant information and communication competencies. Overall, contemporary librarians must possess analytical competencies, be creative, and be able to work with diverse groups of readers. To enhance professional competencies, it is worth organizing library schools, short-term qualification enhancement courses, seminars, conferences, round tables, etc.

In modern conditions, thanks to the main mission of public libraries – to satisfy the information needs of users, new models are used to shape their space, and digital libraries occupy a special place in this complex world of digital challenges. The digital transformation of society is changing the strategies and methods of work of public libraries, which, according to (Kuzma, 2010), must transition from providing exclusive access to knowledge to working as platforms for storing and disseminating the knowledge of the local community in a global context using new technologies such as Web 2.0. One of the main missions of Ukrainian libraries is to preserve their cultural heritage in terms of documentary resources. According to Ukrainian legislation, cultural heritage is understood as a set of objects inherited by humanity from previous generations – landmarks, works of art and architecture that have preserved their authenticity and value from archaeological, aesthetic, ethnological, historical, architectural, artistic, scientific, or artistic perspectives (Law of Ukraine No. 1805-III, 2000). To this end, the creation of electronic libraries is envisaged, as well as the enhancement of the professional information competencies of librarians, which will ensure the efficiency of their functioning.

Analyzing international regulatory documents regarding the preservation of documentary heritage, N. Barbuti (2021) notes that cultural heritage consists of resources inherited from the past in all forms and aspects – material, immaterial, and digital (born digital or digitized), including monuments, places, landscapes,

skills, practices, knowledge, and expressions of human creativity, as well as collections preserved and managed by governmental and private entities such as museums, libraries, and archives. It stems from the interaction between people and places over time and is constantly evolving. These resources are of great importance to society from cultural, ecological, social, and economic perspectives, and thus their sustainable management is a strategic choice for the 21st century. Based on this conclusion, the author believes that digitizing library collections is a social and cultural necessity of the present. Data are no longer mere tools for simplifying administration or enhancing the efficiency of cultural heritage but will become digital artifacts representing a new digital cultural heritage, reflecting each community in its socio-cultural context, a simple or complex ecosystem of the digital age, serving as historical memory and a source of knowledge.

Thanks to digitization processes, libraries can provide worldwide access to significantly more information and knowledge. This is especially relevant when library groups work together in the field of joint management, electronic publishing, and document delivery. European libraries are implementing a range of initiatives at the local, national, and international levels to improve visitors' access to digital information, thereby engaging a wider audience in their services. For example, the European Library initiative includes 48 European national libraries that have a single portal for a global audience to access the collections of national libraries (The European Library, 2014). At the same time, unprotected digital library systems can lead to adverse consequences for both libraries and visitors. Ensuring safe operation on the Internet is a challenging task for modern library professionals due to the increasing threats of Internet vulnerabilities and constant hacking attempts. In this context, digital library security should be considered a multidimensional approach involving both technical and managerial solutions.

Based on the analysis of the practice of American public libraries, T.S. Nicolas-Rocca & R.J. Burkhard (2019) emphasize the importance of training programs for librarians to enhance their information competencies in the field of computer security. In this context, the terminological aspect of this issue requires attention. A. Khan *et al.* (2021) consider information security as a process acceptable for securing information available in printed or electronic form. The authors understand the concept of "information security" in a more general and unifying way regarding the concept of "cybersecurity", noting that there are many problems in information security, such as software attacks on servers, lack of information security training, lack of recovery plan, lack of cyber security policy, intellectual property theft and equipment, information sabotage, and more.

Information security management in the context of library management practice is discussed by V. Singh &

M. Margam (2018), describing the control measures that libraries need to implement to protect their information assets from all potential threats, to ensure the confidentiality, integrity, and availability of their information resources, as well as to help identify and mitigate critical risks and types of network attacks. There are three factors of effective information security management: comprehensive policy; presence of security control mechanisms; information and training program; organizational management system ensuring their implementation. And it is people who are the most important element of information security management (Soomro *et al.*, 2016).

Thus, in the global scientific discourse, information competencies in public libraries are considered at two levels – regarding library users and regarding librarians. Regarding users, information competencies are realized in the acquisition of digital information search tools, formation of reading culture, development of education and self-education. Regarding librarians, information competencies encompass knowledge and skills in human resource management, analytical competencies, and skills in the field of computer security.

Information competencies in academic libraries.

Formation of information competencies in an academic library has its specificity. In recent years, the key directions of knowledge management culture organization in the modern higher education system are as follows: cognitive, managerial, technological (Table 1). This is explained by the fact that the modern university as an organizational structure is conditioned by the specificity of coordination, integration, and concentration processes of human efforts, creativity, initiative, professionalism; dynamics of communicative ties that determine the unity of the collective; specificity of socio-psychological conditions based on the degree of compatibility of collective members; specificity of information-business exchange and adequacy of perception of the organization and its plans by all participants of the organizational environment. Moreover, the dynamics of knowledge management in universities stimulates students to exchange experience and knowledge not only within one educational institution but also in the online educational space in general (Lomachinska & Lomachynskyi, 2022).

Table 1. Directions of knowledge management culture organization in the modern higher education system

Direction	Specifics
Cognitive	Study of the nature of knowledge, features of its development. Ability to manage knowledge, information culture. Changing thinking style, mobilization of individual intellectual and creative potential, transformational leadership, etc.
Managerial	Research on the organizational culture of universities: development of effective management models in higher education institutions and higher education.
Technological	Research on the possibilities of modern information and communication technologies in knowledge accumulation, transmission, and management.

Source: developed by the author

The modern university is the online environment where three groups of subjects are represented: students, teachers, and librarians, and the perspective of information education for these groups differs. Students are perceived as information users, teachers as trainers in the field of information competencies, and librarians are responsible for adapting and implementing standards of information competencies. The undeniable strength of academic libraries lies in their experience and openness, which enable them to introduce new technologies at an early stage of change. Therefore, the role of academic libraries is crucial in universities' readiness for digital transformation (Deja *et al.*, 2021). Librarians' roles in academic circles can be seen as part of the information culture support process through their commitment to developing information competencies.

Changes in information and communication technologies have impacted information centers in universities. This has led university libraries to diversify their services based on digital technologies, facilitating user access to information. Providing technologically intensive services in university libraries has raised doubts about the digital literacy skills of both library staff and

users. It is known that higher education institution libraries provide continuous training to their users on effective library information source utilization. For this reason, university library staff are responsible for their users' education. However, in university libraries where digital technologies are widely used, users lacking or with low digital literacy skills do not derive maximum benefits from these libraries. Therefore, university libraries should provide progressive education appropriate at all levels in the context of access to academic information, considering the digital literacy skills and differences of their users. M. Rafi *et al.* (2019) note that in addition to technological skills and skills in using digital tools, it is also possible to enhance students' information literacy in academic institutions, and the combination of visual learning and technology, inspiration, and Inspire Data help students improve their analytical and organizational skills to effectively process information and data, understand complex concepts, and make quick decisions.

The university library is a dynamic environment striving to meet users' needs in learning, research, and teaching, so attention should be focused on whether the university libraries take appropriate measures to

prevent possible and potential cybercrime threats to intellectual property objects owned by them. Social media remains the best way for library professionals to develop understanding of data and information security (Khan *et al.*, 2021). Universities are becoming smart organizations (environments) where structures are formed by creating metadata, organizing data, their flow, and use. M. Deja *et al.* (2021) emphasize the importance of information and digital literacy as the results of academic librarians' educational activities, which have become significant during digital transformation. In academic circles, there are two levels of this process. One takes place at the administrative level. To benefit from digital transformation, universities as organizations must be "equipped" with relevant information and digital competencies, especially valuable in the context of augmented reality, artificial intelligence, robotization, digitization, and the Internet. Academic librarians have become important actors in the context of implementing information competencies. They were mainly necessary to support students and staff in overcoming barriers to accessing digital resources and services.

With the change in the landscape of technical services, academic research libraries have moved towards greater collaboration with users. Distance education programs require electronic access to library resources. There is an increasing need for access to primary sources in the humanities and social sciences. Digitizing national cultural heritage is of great importance in increasing information literacy levels, as emphasized by foreign researchers. Among the measures aimed at increasing the level of information literacy in the academic environment, students support both collective initiatives – such as information events at the department (discussions, debates), webinars on information culture, and individual conversations with teachers and librarians (Lomachynska & Lomachynskyi, 2021).

Consequently, academic librarians, through their contribution to the development of information literacy, can influence the self-effectiveness and expansion of opportunities for academic personnel. This gives libraries a special place in university information management, where, on the one hand, they shape users' competencies and, on the other hand, affect information management methods in the field of scientific information. Librarians can expand scientists' capabilities during digital transformation through information literacy courses. Librarians can help in digital changes by demonstrating advanced archiving and organization practices of information resources.

Summarizing this theoretical analysis, attention should be drawn to the scientific discussion regarding the correct definition of concepts repeatedly mentioned in this study. In Ukrainian scholarly thought, the concept of "information competence" ("information and communication competence") is predominantly presented in studies of pedagogical orientation. Specifically, N. Morse & A. Kocharyan (2016) emphasize the technological component of this concept, defining information and

communication competence as the ability to use information and communication technologies to meet individual needs and solve professional tasks in a particular subject area. For N. Zavadzka & M. Ignatyuk (2020), information competence, besides the technological aspect of effective information search, includes its analysis and critical understanding, mastery of rational working methods with various types and sources of information for performing diverse tasks in all spheres of life, and confident orientation in the information space. In this interpretation, the concept of "information competence" is close to the concept of "media competence", which, according to Concepts of implementation of media education in Ukraine (2016), encompasses creative critical thinking, positive motivation, and communicativeness.

V. Ivashova *et al.* (2019) focus on the communication component in defining information competence, considering not only information search and structuring according to the specifics of the pedagogical process but also the task setting for teaching through various information and communication methods, qualified work with various information resources, as well as professional tools and methodological complexes. M. Tolmach (2022) does not provide an authorial definition of digital competencies; however, relying on normative documents, he offers potential educational profiles for library workers considering the requirements of the digital age. V. Nikitenko *et al.* (2022) note that digital competence includes the following components: information literacy and data handling skills, communication and collaboration, creation of modern digital content, and information security components. V. Stegantseva (2022) operates with the concept of "informational-digital competence", referring to informational-knowledge, digital, and motivational-ethical components. O. Ovcharuk (2020) considers the issue of digital competencies in the context of digital citizenship.

Regarding other researchers, there is no consensus on the scope of the concepts of "information competence" and "digital competence". R. Vuorikari *et al.* (2016) define digital competence broadly, covering a wide range of competencies, including information literacy, communication and collaboration skills, media literacy, digital content creation (along with programming), knowledge of security issues, particularly digital well-being and cybersecurity-related competencies, as well as problem-solving skills and critical thinking development.

In the concept of "information competence", B.U. Zan *et al.* (2021) also include media competence. Analyzing university libraries as institutions expected to play an active role in developing digital literacy skills among students, the authors emphasize that librarians should voluntarily take on the leadership of digital media. Librarians should also possess digital literacy skills to fulfill this task. In this case, there is a need to support the digital capabilities of library workers through continuous education to enhance their own digital competencies.

M. Deja *et al.* (2021) operate with the concept of “information literacy”, which is based on key digital competencies, self-efficacy, expanding information opportunities, information culture, information management, and information use. The authors note that the concepts of “information literacy”, “digital literacy”, and “media literacy” should be considered closely interrelated. However, if digital competence includes the ability to use, access, filter, evaluate, create, program, and exchange digital content – in other words, it is a specific set of skills and competencies needed for effective work with information in a computer environment – then information literacy in an academic environment presupposes for librarians the possession of information management skills.

In the conclusions to their work, D. Oguiche *et al.* (2017) add technological skills among the main skills and competencies for library workers: computer skills, barcode technology application, database creation and updating, web page design and updating, etc.; information search skills; management skills: library and information specialists as heads of library-information centers should possess some basic management skills to manage various organization departments, such as finances, human resources, etc.; communication skills: a library-information specialist acts as an intermediary between information users and information resources or information providers, as well as digital security skills. A. Khan *et al.* (2021) emphasize the importance of information competencies focusing on information security. In their conclusions, the authors underscore that negative attitudes toward data and information security can hinder the establishment of a reliable infrastructure in university libraries, which may affect the effectiveness of mass digitization projects and ensuring the usefulness of access to the country’s intellectual assets.

Digital competencies, in the context of their close connection with digital citizenship and digital rights, are discussed by L. Pangrazio & J. Sefton-Green (2021). In their conclusions, the authors note that digital literacy and digital rights typically focus on individual actions, while digital citizenship usually involves practices with a collective or group dimension. The authors propose the necessity of continuously improving digital competencies to ensure the protection of digital rights and the formation of responsible digital citizenship, as only their combination allows for effective functioning in the modern digital society.

Thus, the content and scope of the concept of “information competency” in the context of library activities, presented both in Ukrainian and in world scientific thought, largely depend on the active development of information technologies, which entails the gradual transformation of the information society into a knowledge society. The virtualization of library space, the emergence of the reader as a “digital person”, necessitate continuous improvement of digital competencies, the actualization of their security component, and the

threats of cognitive wars require the deepening of media competencies and critical thinking. Accordingly, refining the content of information competencies in library activities, as well as improving the forms and methods of their formation, is a constant dynamic process that evolves as a necessity for an adequate response to the challenges of the modern digital age.

Conclusions

The onset of the digital era has necessitated a deeper understanding of the concepts of “information literacy”, “digital literacy”, “media literacy”, their interconnections, and manifestations. An analysis of theoretical developments, government strategies, and legislation has established that “information literacy” is comprehensive in relation to the concepts of “digital literacy” and “media literacy”, which are its logical components. Information literacy encompasses a complex set of technological skills in the field of information and communication technologies that facilitate effective information retrieval and processing, the ability to interact effectively in the media space, understanding the essence of media texts, and the ability to protect oneself from negative media influences.

In the scientific literature, the prevailing opinion is that the forms and methods of enhancing information competencies in public and academic libraries have their own specificity. Public libraries are unique meeting places for readers, so the idea of organizing spaces for communication, relaxation, entertainment, and learning has become popular, both in Ukrainian libraries and abroad. The task of librarians is not only to develop technological skills in working with information and communication technologies but also to explain the relationship between information freedom and information responsibility. Similar ideas are relevant for children’s libraries, which can offer access to internet communication for both entertainment and educational purposes, and, most importantly, teach safe and ethical use of the virtual environment. Virtual tours, exhibitions, journeys through the pages of favorite books, blogs on social networks, meetings with partners – media experts, and more are used for this purpose. The main goal of academic libraries is knowledge services aimed at deepening cooperation between the academic community – professors, students and librarians to effectively acquire new knowledge. Training sessions on enhancing information and communication skills in working with distance learning platforms, issues of intellectual property, and academic integrity are relevant. The most promising practices for enhancing the level of information competencies of library workers as knowledge managers include organizing a complex of organizational events to improve the level of technological skills in information digitization, working with electronic resources, information, and computer security skills, as well as forming information legal culture in the form of library schools, short-term courses of professional development, seminars, conferences, and more.

Acknowledgements

None.

Conflict of Interest

None.

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Український та міжнародний досвід формування інформаційних компетентностей засобами бібліотечних практик

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Анотація. Актуальність проблеми дослідження пояснюється активною цифровізацією, що ставить перед сучасними бібліотеками завдання застосування нових інформаційно-комунікаційних технологій в роботі задля підвищення рівня інформаційних компетентностей працівників та читачів. Метою статті є визначення основних форм і методів формування інформаційних компетентностей засобами бібліотечних практик в контексті українського та міжнародного досвіду. Методологія дослідження заснована на поєднанні джерелознавчого аналізу, компаративного аналізу, системного та логічного методів наукового дослідження. В результаті проведеного дослідження було зазначено, що поняття інформаційної грамотності охоплює комплекс технологічних навичок, які сприяють ефективному пошуку та опрацюванню інформації, підвищують здатність ефективно взаємодіяти у медіапросторі, розуміння сутності медіатекстів та вміння захисту від негативних медіавпливів. На основі аналізу законодавчої бази визначено зміст понять «цифрова компетентність» та «медіакомпетентність», що є складовими інформаційної компетентності. У статті визначено специфіку форм і методів підвищення рівня інформаційних компетентностей у публічних та академічних бібліотеках. У публічних бібліотеках робота з підвищення рівня інформаційних компетентностей охоплює вміння та навички використання інформаційно-комунікаційних технологій; пошуку інформації в мережі Інтернет; безпечної та відповідальної роботи у віртуальному просторі; критичне опрацювання інформації, отриманої з медіа ресурсів. У академічних бібліотеках, окрім означеного, робота спрямована на розширення знаннєвого обслуговування, посилення взаємодії викладачів, студентів і бібліотекарів задля ефективного проведення інноваційних досліджень та якісного засвоєння нових знань. Для бібліотекарів як менеджерів знань, підвищення рівня інформаційних компетентностей охоплює комплекс технологічних, інформаційно-правових, методичних, морально-етичних знань із залученням безпекової складової. Практичне значення дослідження полягає у можливості більш ефективного використання проаналізованих практик формування інформаційних компетентностей українськими бібліотеками

Ключові слова: інформаційна грамотність; цифрові компетентності; медіа компетентності; інформаційна безпека; публічні бібліотеки; академічні бібліотеки



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 8, No. 3, 34-43

Article's History: Received: 15.08.2023 Revised: 03.10.2023 Accepted: 08.11.2023

UDC 94:373.5(477) "1985/1991"

DOI: 10.69587/sdc/3.2023.34

Ideological aspects of the educational process in schools of the Ukrainian SSR in the conditions of liberalization 1985-1991

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Abstract. The need for a complete cleansing of Ukraine's socio-cultural space from Soviet ideological narratives today highlights the necessity to analyse key ideological concepts that were instilled in the younger generation through the system of general secondary education of the Ukrainian Soviet Socialist Republic. The purpose of the article is to analyse the ideological aspects of filling the educational process in schools of the Ukrainian SSR in the conditions of liberalization in 1985-1991, the search for an educational paradigm in the process of school reform. The research methodology is based on the principles of historicism, scientificity, objectivity; analytical, descriptive methods, as well as the method of systematization and critical analysis were applied in the work. The article analyses the peculiarities of the ideological content filling of the educational process in schools of the Ukrainian SSR and the features of Soviet ideological education in the conditions of the proclaimed course of "perestroika" in 1985-1991, the search for an educational paradigm in the process of school reform. The ideological and educational strategy of the initial process, the main ideological narratives of the content filling of educational subjects, which were supposed to form "Soviet" patriotism and political consciousness of Soviet citizens, are analysed. It is established that an exclusive role in the educational process was assigned to the political education of teachers, and the unity of views in strategically important directions for the communist regime was ensured by censorship, which controlled the publication of educational and other literature. It is noted that the democratization of socio-political life, which intensified after the XXVII Congress of the Communist Party of the Soviet Union, and the liberalization of the educational sphere became irreversible. Progressive teachers introduced new methods into school education, sought means of updating the educational process, experimented with new materials in the lessons of periodical publications. The special demand and need for updating were caused by disciplines of the Ukrainian studies cycle, and the most relevant in the educational environment became historical themes and previously banned topics of Ukraine's national life. The materials of this article can be practically applied for further research of the history of general education schools of the Soviet Ukraine in the complex period of socio-political and socio-cultural transformations of the "perestroika" era

Keywords: "perestroika"; transparency; school; educational process; communist ideology; educational work

Introduction

Education plays a key role in shaping the civic position and patriotism of the younger generation. Independent Ukraine since the early 1990s has inherited

many socio-cultural phenomena from the Soviet era, including significant Russification and the dominance of Soviet (largely Russian) narratives in the cultural and

Suggested Citation:

Adobash, V. (2023). Ideological aspects of the educational process in schools of the Ukrainian SSR in the conditions of liberalization 1985-1991. *Society. Document. Communication*, 8(3), 34-43. doi: 10.69587/sdc/3.2023.34.



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informational space. The processes of decommunization, which began on a large scale after the start of the Russian-Ukrainian war in 2014, marked the beginning of the cleansing of the socio-cultural space from the ideological legacy of the past. In this regard, communist ideological narratives, which were actively propagated through the education system of the Ukrainian Soviet Socialist Republic in the 1980s, laying down the worldview beliefs of the youth and shaping the political consciousness of the generation of Ukrainians who continued their civic and social realization in independent Ukraine, require in-depth analysis. Therefore, contemporary issues of nation-building, civil society formation, are still relevant today, to a large extent stemming from the Soviet past. The study of the ideological aspects of the educational process, the content filling of the educational process of the studied period, is also important in the context of the ongoing information war.

In the historiographical discourse, issues of Ukraine's social development in the studied period have been actualized. V. Danylenko & V. Kotsur (2021), revealing the key social problems of Ukraine's development in the specified period, prove the irreversibility of socio-cultural and political changes in the Ukrainian SSR and the Soviet Union as a whole during the second half of the 20th century, demonstrating the destructiveness of the social and national policies of the Soviet state. J. Bardashevska (2018) analysed the everyday life of the urban population, including its socio-cultural aspects, using Crimea as an example, and came to conclusions about the increase in crisis phenomena in the social sphere of life in Soviet society and the emergence of new trends in the socio-cultural sphere in the conditions of "perestroika". The appearance of commercial leisure establishments and the spread of foreign artistic production led to the formation of new value orientations, especially among young people, the transformation of state-church relations, and the revival of religious worldview, and so on. The researcher concludes that in 1985-1991, the state, through the cultural sector, continued its ideological influence on the population; on the other hand, the processes of "perestroika" led to a weakening of control over cultural life, and commercialization of the service sector led to a desire to satisfy consumer preferences (Bardashevska, 2018). In one of the chapters of the collective monograph "Sociocultural Preconditions of the Russian-Ukrainian War: Evolution of Ruscizm" (2023), the processes of Russification of culture as a means of destroying the national-cultural identity of Ukrainians are shown, where the authors partially summarize the state of Russification of various cultural sectors by the end of the 1980s (Kotsur, 2023).

Certain aspects of educational development in a local context are discussed in the monograph by E. Buket *et al.* (2018), which concluded that the declared course of "perestroika" and the Chernobyl nuclear power plant accident significantly influenced the life of the Vilne

village school and changed the format of the educational process. Local history materials from regional periodicals of the late 1980s to early 1990s (using the example of Pereiaslavshchyna) as a source of renewal of the educational process in secondary educational institutions of the Ukrainian SSR were analysed in the article by O. Tarapon (2022). The position and professional activity of the scientific and pedagogical intelligentsia of the Ukrainian SSR during the specified period are highlighted in the monograph by R. Potapenko (2021b), which, in particular, analyses the role of the pedagogical intelligentsia in the processes of democratization of education and the formation of the national socio-humanitarian space. By examining the transformation of the Soviet system of patriotic education through the work of scientific and pedagogical personnel and the school education system, the author concludes that the emphasis on national-patriotic education during the "perestroika" was influenced by the growth of national processes in the republic and the active stance of progressive educators in the processes of national revival. The issue of the position and activities of scientific and educational personnel in the conditions of ideological transformations caused by the perestroika was considered in a separate article (Potapenko, 2021a).

Overall, the problem of the development of general education schools has not become a separate subject of study in Ukrainian and foreign historiography. Further research is needed to examine the situation of school education in the conditions of liberalization and social transformations of 1985-1991, in particular, it is necessary to study the ideological component of the educational process. The purpose of the article was to analyse the ideological aspects of filling the educational process in schools of the Ukrainian SSR in the conditions of liberalization, 1985-1991, and to search for an educational paradigm in the process of school reform.

Materials and Methods

The research methodology is based on the principles of historicism, scientific rigor, and objectivity. Analytical and descriptive methods, as well as methods of systematization and critical analysis, were employed. The principle of historicism allowed for the analysis of the ideological content of the educational process in accordance with the specific historical circumstances of the "perestroika" period, characterized on one hand by the efforts of state authorities to control scientific and educational processes, and on the other hand by the liberalization of social life and the democratization of the socio-cultural environment. Following the principle of objectivity, the author attempted to rely on concrete facts to demonstrate the key communist ideological elements in ensuring the educational process of secondary education in the Ukrainian SSR during the period of 1985-1991. The lower chronological boundary of the study was the April Plenum of the Central Committee of the Communist

Party of the Soviet Union (CPSU). The upper chronological boundary was the collapse of the USSR and the loss of the status of Marxism-Leninism as the official ideology in the post-Soviet space.

This work is based on official historical sources, therefore the leading method used was the method of systematization and critical analysis, which helped to systematize the material from processed archival and printed sources, identify their ideological component in the work of secondary educational institutions, and analyse the ideological aspects of the work of schools in the Ukrainian SSR during the "perestroika" period as objectively and impartially as possible. The analytical method aimed to demonstrate the impact of the overall political strategy of democratization on the educational process and its gradual renewal. The descriptive method allowed for the identification of the most typical ideological narratives disseminated in the educational process of general education schools in the Ukrainian SSR, characterizing their communist content and orientation towards the cultivation of Marxist-Leninist ideology.

Since the chosen topic has not been the subject of separate extensive research in scholarly literature, this work is based on published and archival primary sources. Valuable sources for studying the topic included materials from the Central State Archive of Public Organizations of Ukraine, containing official documents of the Communist Party of Ukraine and its ideological department, as well as educational institutions. The use of these archival documents allowed for the identification of certain directions of the state strategy for ensuring the representation of communist ideology in the publishing sphere. Among the normative legal sources, official materials from the "Collection of orders and instructions of the Ministry of Education of the Ukrainian SSR" were used, which helped determine the specific ideological component of the educational work of schools in the researched period. Significant sources for studying the topic were journalistic materials, particularly articles from the newspaper "Soviet Education" – the organ of the Ministry of Education of the Ukrainian SSR, the Ministry of Higher and Secondary Specialized Education of the Ukrainian SSR, the state committee of the Ukrainian SSR on vocational and technical education, and the Ukrainian Republican Committee of the Trade Union of Education Workers, Higher Education, and Research Institutions. This publication informed about all components of educational development, including the state of ideological work in educational institutions. The study of this topic was conducted with the involvement of educational literature that demonstrates the ideological content of educational material (Dolenko *et al.*, 1980; Stepaniuk, 1985). Overall, the use of historiographic and historical sources allowed for the analysis of the ideological component of the educational process in the conditions of the liberalization course of 1985-1991.

Results and Discussion

Education has always been in the mainstream of all societal transformations, as qualitative changes in all spheres of state life are possible with a high professional level and civic consciousness of the population. The period of "perestroika" witnessed complex processes of ideological and value-based reformatting of the socio-cultural space in Ukraine. Education occupied a special place in these processes. Firstly, the Soviet regime paid exclusive attention to educational institutions as a means of shaping Soviet citizens, ideological upbringing of the younger generation, continuing to control the educational process, directing the educational-methodical work of educators, determining its substantive content, and so on. One of the primary tasks of the educational process in Soviet schools was patriotic education. Soviet ideological work aimed to cultivate "Soviet" patriotism, pride, and love for the motherland, readiness for self-sacrifice. At the same time, "Soviet" patriotism was based on the principles of state and Russian exclusivity, which led to isolation from other nations. Such educational strategy shaped "Soviet" patriotism, which lacked a place for national identity (Ovchar, 2008).

"Soviet" patriotism encompassed a range of values based on communist ideology and Soviet tenets, the teaching of which in educational institutions was closely monitored and adjusted by state authorities. For example, in 1986, the Ministry of Education of the USSR, analysing the issue of school performance (Taranenko, 1986a), determined the effectiveness of the educational work of teachers and schools not only by the level of subject knowledge but also by the ideological-political literacy of students, including their formed Marxist-Leninist worldview, ability to evaluate events in their country and abroad from a class perspective according to their age, and "resistance to the influence of bourgeois ideology". The tasks of ideological and educational work included students' assimilation of the norms of communist morality, knowledge and observance of Soviet laws and rules for students, social activism, collectivism, participation in the activities of pioneer and Komsomol organizations, school self-government, and so on. According to the recommendations of the Ministry of Education of the USSR, the education system was supposed to ensure the comprehensive and harmonious development of students, the organic interconnection of ideological-political, moral, labour, patriotic, international, and aesthetic education of students (Lavrut, 2020).

On the level of ideological control over the educational process and its substantive content within the framework of the overall Union interests, periodical materials provide evidence. For instance, in the newspaper "Soviet Education" on the eve of the declaration of the official course towards "perestroika" in March 1985, the Ministry of Education of the USSR gave detailed recommendations for the wide celebration in general education schools of the 80th anniversary of the 1905-1907

revolution in Russia, "as a significant event in the history of the CPSU and the Soviet Union, in the history of the world communist, workers', and national liberation movement". The proposed lecture topics were intended to cement in the minds of children the primacy of the Russian proletariat and the leading role of the Communist Party in progressive transformations both within the USSR and beyond its borders. The forms, methods of conducting events, and the patriotic-educational goal they were supposed to achieve were specified (Taranenko, 1986b).

The implementation of the party line in education in each region was regularly monitored, and corresponding decisions were made at the level of the Ministry of Education based on the results of inspections. For example, in the protocol "Decision of the Collegium of the Ministry of Education of the Ukrainian SSR dated April 24, 1986", it was noted that in the course of implementing the reform of general and vocational schools in the Chernivtsi region, educational work, including the formation of a Marxist-Leninist worldview among students, was slowly being restructured. There was a lag in meeting the requirements for the study of the Russian language in national schools, and many students had not acquired the skills of fluent Russian language proficiency. The absence of significant changes in the methods and forms of educating students was noted, including insufficient levels of atheist work, superficial knowledge of students in matters of internal and foreign state policy, lack of knowledge of the symbols of the Soviet state by individual students, insufficient activity in the educational work of school collectives, and so on (Taranenko, 1986b). As a result of the inspection, the Collegium of the Ministry of Education of the Ukrainian SSR decided to instruct the heads of the regional and district departments of public education of the Chernivtsi region to intensify work on restructuring the educational process and to focus efforts on implementing the decisions of the XXVII Congress of the CPSU and the XXVII Congress of the Communist Party of Ukraine, "to give a principled assessment to the directors of schools that do not ensure the proper level of work" and to demand from all school management levels the restructuring of educational work with students, involvement in its organization of school *Komsomol* and pioneer organizations.

In order to effectively implement Soviet patriotic education of schoolchildren, attention to political education of pedagogical personnel was intensified. For example, in the Rivne region alone, by the beginning of 1985, 697 schools of scientific communism were established, with approximately 14,000 employees enrolled; 90% of school directors and their deputies, as well as heads of preschool institutions, were approved as propagandists. Significant emphasis was placed on the assimilation by listeners of theory, methodology of ideological work, counter-propaganda, and scientific atheism. Illustrative is the title of the developed optional special

course for listeners, "Modern ideological struggle and basics of counter-propaganda among students of secondary general education school" (Sytnyk, 1985). To assist propagandists in the field of education, the central pedagogical press published materials on party care in the development of education in the Ukrainian SSR, for example, during the post-war *perestroika* and strengthening of the material base of Ukrainian schools, and so on (Stepaniuk, 1985).

Thus, the educational content in schools of the Ukrainian SSR was filled with ideologically "correct" substance. The leading thesis of communist propaganda was the assertion of ethnic "unity" of the Russian, Ukrainian, and Belarusian peoples, aimed at accelerating the course of party-state leadership towards the assimilation of non-Russian population. Therefore, party bodies, educational and cultural-information structures, and so on, acted as means of Russification. The idea of the all-Soviet value of the Russian language was propagated, and in 1989, the Central Committee of the CPSU, by a separate resolution, legislatively established the status of the Russian language as state-wide, and in 1990, the Supreme Soviet of the USSR adopted a law on the languages of the USSR, according to which the Russian language was granted the status of official (Danylenko & Kotsur, 2021).

The content of the school educational program of the investigated period is best reflected in the educational literature, namely textbooks. After all, it is the textbook that serves as the main publication for educational institutions, corresponding to the state program and providing a systematic presentation of the educational discipline. School textbooks carried not only informative content but also ideological and educational content. The materials of textbooks reflected Soviet values, aimed at fostering internationalism, love for the Soviet Motherland, respect for the leading structure – the CPSU, leaders of the Soviet Union, the beneficial influence of Russian culture on the Ukrainian one, and so on. For instance, the Ukrainian language textbook for the 4th grade in 1980 began with quotes from V. Lenin, party leaders, Russian and Ukrainian classics about language. And in the second paragraph "Affinity of the Russian and Ukrainian languages" the thesis about the common origin of the languages of the "fraternal" Ukrainian and Russian peoples was expressed: "Russian and Ukrainian languages are related (similar). This is explained by the fact that they (as well as Belarusian) originate from one language – Old Russian. Russian and Ukrainian peoples are fraternal, "so close in language, place of residence, character, and history". It was also emphasized here the joint efforts of these peoples in building communism. Selected tasks were intended to emphasize the close relationship between the Ukrainian and Russian languages: to translate words into Ukrainian and compare their pronunciation, to find and compare common words and their parts, based on the selected quotes, students were supposed to draw a conclusion about the significant

role of the “fraternal” Russian language as a “universally recognized world language”, a language of international communication and cooperation, a “bridge language” that unites peoples, “who shortly before that did not even know about each other’s existence”, a language that strengthens the position of other allied languages. Further along the textbook text, there are constant inclusions of Soviet terms, concepts (Lenin’s path, pioneer camp, collective farm, Komsomol members, five-year plan), highlighting the role of leading structures and their leaders (Communist Party, Lenin), characteristic emphasis on belonging to the Soviet order – Soviet Motherland, Soviet scientists, Soviet people, Soviet soldiers, and so on. Examples of texts about Soviet heroism during World War II are given, and so on. The authors did not overlook the important propagandist thesis about the “reunification” of Ukraine and Russia, the role of B. Khmelnytsky, who “forever reunited the Ukrainian people with the Russian people”, which became the guarantee of strong friendship between the “fraternal peoples”, and so on (Dolenko *et al.*, 1980).

Therefore, only in the textbook are the main ideological theses promoting communist ideology included. They dominated in educational literature until the late 1980s and aimed to educate Soviet citizens with internationalist views and pride in the Soviet homeland. It is indicative that even in the conditions of the liberalization course of “perestroika” and “glasnost”, with increased societal demand for historical truth, changes in the content of textbooks occurred rather slowly. Textbooks on the history of both the USSR and the Ukrainian SSR presented the material using a formation-based approach, with an emphasis on the “common” history of the “three fraternal peoples” – Russian, Ukrainian, Belarusian – their common struggle against external and internal class enemies, and the desire for reunification with the progressive “fraternal” Russian people. The emphasis was on revolutionary events and class struggle as the driving force of human development, with mandatory emphasis on the progressive role of the CPSU Central Committee and party leaders, primarily the figure of V. Lenin. Illustrations and quotes, included examples, appealed to the heroization of party-Komsomol themes, the Soviet homeland, and so on (Potapenko, 2021b).

In this context, it is worth mentioning the role of censorship in the Soviet information space, which aimed to ensure unity of opinion in strategically important directions for the communist regime. The liberal course declared by the policy of “perestroika” led to a certain relaxation of censorship. However, the leadership of the Soviet republics, including Ukraine, continued to try to control the publishing of scientific and educational literature. If, at the request of the intellectual elite of Ukraine, the authorities agreed to publish previously banned works or “unpopular” topics, corresponding political and ideological accents were necessarily set. For example, before the reissue of D. Yavornytsky’s work

“History of the Zaporizhian Cossacks” (in 3 volumes), the Academy of Sciences of the Ukrainian SSR received a relevant directive from the Central Committee of the Communist Party of Ukraine to add an introductory article, notes, and scientific comments to the publication regarding the evolution of D. Yavornytsky’s views from liberal-bourgeois to Marxist, certain “deficiencies” of his worldview, and to emphasize the critical analysis of the scientist’s work and some of his scientific approaches (Department of Science and Educational Institutions of the Central Committee of the Communist Party of Ukraine *et al.*, 1987).

A key moment for societal changes was the XXVII Congress of the Communist Party of the Soviet Union (February 25 – March 6, 1986), during which the General Secretary of the USSR M.S. Gorbachev (1986) in his political report noted the increase in bureaucracy, stagnant phenomena in all spheres of social life, and pointed out the direction of change – the improvement of social relations, the restructuring of thinking, the cultivation of a new psychology, and dynamics as the basis of development. Educational institutions were to play a key role in improving the preparation of youth for life, work, and the upbringing of conscious builders of a new society. Simultaneously, a movement towards an international community on the basis of a unified ideology and political tasks, a course towards the convergence of nations, and distancing from national isolationism were proclaimed. Therefore, a separate point of M.S. Gorbachev’s (1986) political report was dedicated to the issues of the connection between ideology and life, fidelity to Marxist-Leninist ideas, the development of social consciousness, and the means of achieving them.

The decisions of the congress by the country’s leadership were considered so important that their content and main theses were recommended for study in subjects taught in secondary schools. In April 1986, the Ministry of Education of the USSR approved the instruction “On the Organization of Studying and Explaining to Students of Secondary Schools the Materials of the XXVII Congress of the CPSU”. The purpose of these methodological recommendations was to help teachers convey to each student the “essence and spirit” of the congress, the significance of its decisions for Soviet society, and for the “entire world development”. According to the conviction of the education authorities, the ideas of the congress, organically woven into the content of social-humanitarian and natural sciences, were to become an important means of shaping the Marxist-Leninist worldview, political culture, labour, and social activity of students. Starting from the elementary grades, educators were to introduce children to the work of the XXVII Congress, the plans and deeds of Soviet people who implement the decisions of the Leninist party, with the aim of forming civic consciousness, fostering “feelings of love for the homeland of Lenin, October”, the native land, and the desire to participate in collective

work. Let's pay attention to the alignment of ideological accents: 1 – fostering love for the “homeland of Lenin” – i.e., Russia, 2 – love for the native land – i.e., the smaller Homeland. Thus, there was a blurring of national identity, affiliation with Ukraine as a cohesive national organism, a separate republic, etc.

Further in the methodological materials, it was emphasized that it is necessary to explain the important role of the party congress in the life of everyone, as the best representatives of the communist activists are delegated to it to determine the future prospects of the country's development, improvement, and acceleration of the pace of development of all sectors of the economy. It is necessary to educate through examples of selflessness of Soviet working people, to show the progressive leading role of communists and the party, who defend peace worldwide, strengthen the friendship of all “fraternal peoples” of socialist countries, and working people worldwide. Within each subject, teachers were to provide vivid examples of positive changes in the country, the life, and work of Soviet people. Methodological recommendations provided clear guidance on the corresponding work within each subject, paying particular attention to the socio-humanitarian cycle of disciplines, primarily history, and specific recommendations for presenting materials in each class.

At the XXVII Congress of the CPSU, M.S. Gorbachev (1986) voiced a course towards further democratization and openness as the basis for the “psychological” restructuring of cadres, with truth as the guarantor of progressive progress. The course of openness essentially defined the direction of liberalization of the educational process in the country. The educational space was influenced by general societal tendencies that arose as a result of the democratization of the intellectual environment, enlivening national processes in the republic. As researchers V.M. Danylenko & M.K. Smolnitska (2011) rightly assert, political democratization affected the consciousness of the population of different ages – from school and student youth to pensioners, indicating a wide range of views on current events in the country and polar socio-public positions – from moderate to openly radical. Despite the attempts of the party leadership to control not only political processes but also socio-cultural ones, societal attitudes were changing. Progressive teachers introduced modern methods into school education, sought ways to renew the educational process, and experimented with new materials from the press and television in their lessons. On the other hand, a certain opposition, which engulfed society under the influence of openness, slogans of criticism and self-criticism, penetrated the school environment through the active part of students (especially senior classes), forcing even conservative teachers to adapt to the demands of the time. The activation of religious consciousness among the population contributed to the growing interest in the religious-ritual culture of Ukrainians. As a result, by

1989, there was a decline in the authority of official communist ideology. This was felt, first of all, in terms of improving the party-political work of leading cadres, which always received considerable attention. In the materials of inspections, there was talk of a decline in the educational level of subjects such as “Scientific Communism”, “Party Building”, “Historical Experience of the CPSU”, etc. (Povidash, 1991; Potapenko, 2021b).

Special demand and the need for renewal were provoked by disciplines of the Ukrainian studies cycle (history of Ukraine, Ukrainian language, and literature), which underwent the most significant ideological distortions and oppression in the previous period. Historical topics became the most relevant in the public environment; the unveiling of previously forbidden historical documents and themes sparked interest in society and strengthened the demand for truth. Society, and primarily its intellectual elite, which had lost old ideological landmarks, eventually began to demand the truth. Thus, the Archaeological Commission of the Academy of Sciences of the Ukrainian SSR, which resumed its activity, began preparations for the publication of works by authors previously effectively banned – M. Hrushevsky, D. Yavornytsky, V. Antonovych, D. Bahalii, and others (Committee of the Communist Party of Ukraine *et al.*, 1990).

The updating of the content of the educational process in the Ukrainian-centric direction was facilitated by the scientific developments of national scientists, materials of progressive periodicals, such as “Literary Ukraine”, “Ukrainian language and literature in school”, etc., as well as materials of local periodicals, which began to actively publish local history topics. For example, materials from the Pereiaslav periodicals from the late 1980s to the early 1990s became an alternative source for updating the educational process of secondary educational institutions of the Ukrainian SSR. The local history section, where materials on the history of Pereiaslav were published, provided the opportunity for their use in history and literature lessons, helped to form new approaches to educational work based on national principles (Tarapon & Adobash, 2022). Overall, among the materials of literary and artistic and socio-political publications of the studied period, materials of historical nature predominated, aimed at filling the “blank spots” of Ukrainian history and returning banned names (about the Holodomor of 1932-1933, liberation struggles of the early 20th century, Stalinist terror, suppressed revival, etc.) (Danylenko & Smolnitska, 2011). Significant attention in the pages of periodicals was paid to the issues of Ukrainization of education and the role of the school in the processes of national revival, which marked the beginning of a broad intellectual dialogue on language and culture (Danylevsky, 2020).

The policy of glasnost contributed to the opening of archives, the emergence of new, previously forbidden information, and also spurred increased demand from society for historical truth. Children remained the

litmus test of all complex social transformations, as generational shifts occurred, typical of transitional historical periods, such as the "perestroika" period. Teachers found themselves in challenging conditions in search of a new educational strategy, which, on the one hand, had to correspond to the state development program and, on the other hand, meet the demands of society (especially the youth), which were changing rapidly, becoming more demanding, or even radical.

During the period of liberalization in the Ukrainian Soviet Socialist Republic in the second half of the 1980s and early 1990s, significant transformations took place in the ideological aspects of the educational process in schools. Various sources, including research, articles, and publications, provide an opportunity to understand the multifaceted nature of these processes and their impact on society and the educational system. Yu.O. Kakhanov (2019) examined the evolution of perceptions of the ideal representative of Soviet society in the Ukrainian context. He revealed changes in the perception of socialist ideology during the years of liberalization and their impact on school curricula and educational methods. Such scholarly work has significant value in the context of studying the evolution of ideological and cultural aspects in Ukrainian society during the Soviet era. However, it should be noted that the research may be limited in the context of its own specificity and methodology used by the author.

O.A. Shanovska (2008) added a new aspect to understanding the influence of cultural initiatives on educational processes. She emphasized the importance of creative associations in shaping new cultural practices and identity, which could be reflected in changes in school programs and teaching methods. The research is characterized by a unique approach to studying the impact of cultural initiatives on cultural revival during the period of restructuring. It deeply analyses the role of creative associations in shaping cultural practices and identity. O.P. Zhaluk (2015) examines the role of club institutions in the process of shaping national consciousness and cultural revival in Ukrainian society. This work highlighted the importance of the role of school clubs in educating the younger generation and shaping national identity. Additional sources, such as the works of E. Lysa (1990), O. Demchenko (1991), and V.G. Shevchenko (1990), point to the importance of the contribution of the intellectual and cultural elite to the creation of a new educational system and its influence on the formation of national consciousness. All these studies and publications have provided a better understanding of the processes and the importance of understanding the ideological aspects of the educational process in the conditions of liberalization from 1985 to 1991 in Ukrainian schools and emphasized the diversity and complexity of transformations in society and the educational system, as well as the significant impact of the intellectual and cultural elite on the formation of Ukrainian national and cultural identity.

Moreover, works related to the socio-political development of Ukraine during the "perestroika" transformations of 1985-1991 show the course of political reforms and changes in public sentiment that influenced the liberalization of the educational process. The author shares the opinion of V.M. Danylenko & M.K. Smolnitska (2011) that political democratization affected the consciousness of people of different ages – from school and college students to pensioners, demonstrating a wide range of views on current events in the country and polar social positions – from moderate to openly radical. The author also believes that it was the youth who actively responded to changes in society, which contributed to the irreversibility of socio-cultural changes towards liberalization.

The majority of works related to this discourse are only tangentially related to the topic under investigation, providing insights into the political course of restructuring and socio-political changes under the influence of democratization processes. Works addressing the social aspects of the history of the specified period demonstrate changes in social attitudes in conditions of liberalization and the course towards openness; however, they do not directly address the issue of democratization of school education. The most informative on the chosen topic are the works of R. Potapenko (2021b), where certain aspects of ideological changes in the educational and upbringing process are revealed through the prism of the position and activities of the scientific and educational intelligentsia. The author agrees with the researcher's assertion that at the beginning of the restructuring, scientific and educational institutions remained instruments of ideological education for youth, and educators were supposed to transmit the state ideology to society. Only the relaxation of ideological state pressure laid the groundwork for the humanization of the educational process. The author examines all levels of education – from school to higher education.

In summary, regarding the topic of ideological aspects of the educational process in schools of the Ukrainian SSR during the liberalization of 1985-1991, it can be noted that this period was characterized, to some extent, by significant transformations in the field of education, which occurred against the backdrop of general political changes. Liberalization somewhat led to the emergence of new ideas and approaches in educational programs, promoting greater freedom in the educational process. Changes in ideological perceptions influenced the content of educational materials and approaches to upbringing, opening the doors to greater diversity and openness. However, it is worth considering that this period was also accompanied by significant challenges and contradictions associated with the transition from the old ideology to new approaches, which required the adaptation of the educational system to new realities.



Conclusions

During the period under study, education played a key role in societal processes; in the Soviet state, it served not only an educational function but also an ideological and educational one, serving as a means of shaping Soviet citizens and exerting ideological influence on the younger generation. Therefore, even amidst the liberalization of societal processes, the authorities continued to control the educational process, determine its substantive content, and direct the educational and methodological work of educators. The content of school education was determined by communist ideology and the task of instilling Soviet values in the younger generation and "Soviet patriotism". Educational materials aimed to cultivate in students a sense of internationalism, friendship among the peoples of the Soviet Union, instil the idea of the unity of the "fraternal" Ukrainian and Russian peoples, demonstrate the beneficial influence of Russian language and culture on the national development of the republics, and reinforce the thesis of the primacy of the Russian proletariat, the leading role of the Communist Party of the Soviet Union and its leaders in the development of society, and so on. School subject materials were based on the principles of scientific communism, a formation approach, and included examples aimed at reinforcing Soviet terms and corresponding political clichés. Political education of teachers played an exceptional role. Regular monitoring of the results of educational work in educational institutions in various regions of the republic was conducted, the results of which were considered at the level of the Ministry of Education. Consensus on strategically important directions for the communist regime ensured censorship, which allowed for the control of the publication of scientific and educational literature. Therefore, even in conditions of glasnost, the publication of previously banned literature, demand for which was growing among the intelligentsia, took place cau-

tiously and under the supervision of the relevant Soviet structures, which made the "correct" emphases and comments.

However, the liberalization of the educational process overall, and schools in particular, has led to irreversible changes. The 27th Congress of the Communist Party of the Soviet Union in 1986 and the speech by General Secretary M. Gorbachev outlined a course for accelerating the restructuring of socio-economic processes, democratization, and transparency. At the same time, there was still a declared course towards internationalization and the convergence of nations, which meant the practical continuation of the Russification of the cultural and educational space. Despite the efforts of party leadership to control political and socio-cultural life, societal attitudes were changing. Progressive teachers introduced modern methods into school education and sought ways to renew the educational process. Since the majority of textbooks still carried ideological baggage, the liberalization of periodical publications, which focused on historical themes, filling in the "white spots" of Ukrainian history, language issues, and processes of national revival, contributed to the renewal of the content of educational work. Local publications' ethnographic sections helped educators form Ukrainian studies approaches to the educational process. The specifics of ideological work in secondary educational institutions require detailed elaboration and expansion. Further analysis is needed on the social attitudes of student youth, changes in their ideological beliefs under the influence of new phenomena in social and cultural life.

Acknowledgements

None.

Conflict of Interest

None.

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Ідеологічні аспекти навчального процесу в школах УРСР в умовах лібералізації 1985-1991 рр.

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Аспірант

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Анотація. Потреба повного очищення соціокультурного простору України від радянських ідеологічних наративів актуалізує сьогодні необхідність проаналізувати ключові ідеологічні концепти, що прищеплювалися підростаючому поколінню через систему загальної середньої освіти Української Радянської Соціалістичної Республіки. Метою статті є аналіз ідеологічних аспектів наповнення навчального процесу в школах Української РСР в умовах лібералізації 1985-1991 рр., пошуків навчальної парадигми в процесі реформи школи. Методологія дослідження ґрунтується на принципах історизму, науковості, об'єктивності, у роботі застосовано аналітичний, описовий методи, а також метод систематизації та критичного аналізу. У статті проаналізовано особливості ідейного змістовного наповнення навчального процесу в школах Української РСР та особливостей радянського ідеологічного виховання в умовах проголошеного курсу «перебудови» 1985-1991 рр., пошуків навчальної парадигми в процесі реформи школи. Проаналізовано ідейно-виховну стратегію навчального процесу, основні ідейні наративи змістового наповнення навчальних предметів, котрі мали формувати «радянський» патріотизм та політичну свідомість радянських громадян. Встановлено, що виключна роль в освітньому процесі відводилася політичній освіті педагогів, а єдність думок у стратегічно важливих для комуністичного режиму напрямках забезпечувала цензура, котра контролювала видання навчальної та іншої літератури. Установлено, що демократизація суспільно-політичного життя, що активізувалася після XXVII з'їзду Комуністичної партії Радянського Союзу, лібералізація освітньої сфери стала незворотною. Прогресивні вчителі привносили в шкільну освіту новітні методи, шукали засобів оновлення освітнього процесу, апробували на уроках нові матеріали періодичних видань. Особливий запит і потребу оновлення викликали дисципліни українознавчого циклу, а найбільш актуальною в освітньому середовищі стала історична тематика та заборонені раніше теми національного життя України. Матеріали даної статті можливо практично застосовувати для подальшого дослідження історії загальноосвітньої школи радянської України в складний період суспільно-політичних та соціокультурних трансформацій доби «перебудови»

Ключові слова: «перебудова»; гласність; школа; освітній процес; комуністична ідеологія; навчально-виховна робота



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 8, No. 3, 44-54

Article's History: Received: 13.08.2023 Revised: 30.10.2023 Accepted: 08.11.2023

UDC 027 (100):004.77

DOI: 10.69587/sdc/3.2023.44

Efficiency of remote access services by global libraries

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Abstract. In the context of modern challenges and increasing demand for digital services, questions of remote library work, the use of interactive technologies aimed at the development of education, science, and civil society are quite relevant. The purpose of this study is to explore the global experience of remote access utilization in library activities, the historical peculiarities of the formation and development of distance library services in European and North American countries, the characterization of its effectiveness and prospects for its application in Ukraine. During the research, methods of generalization, comparative, and source analysis were applied. The features of remote access functioning of global libraries are highlighted, its effectiveness, advantages, and disadvantages are revealed. The development of information technologies and their impact on publishing, library attendance, scientific activities, exchange of experience, etc., are characterized. Trends in the development of global libraries are identified. It is established that for most European libraries, the priority direction has become digitization and opening access to books, press, documents, archives. It is found that remote access accelerates scientific research. In the second decade of the 21st century, there is a growth in online visits to library collections. The development of remote services provision by Ukrainian libraries is highlighted, as well as the main trends in this process in the context of the Russian-Ukrainian war. The importance of copyright protection in the context of remote access provision is disclosed. One of the measures was the introduction of electronic lending (e-lending), which involved receiving payment for the use

Suggested Citation:

Zlenko, A., Miroshnichenko, D., Lyashchenko, Yu., & Zlenko, Ya. (2023). Efficiency of remote access services by global libraries. *Society. Document. Communication*, 8(3), 44-54. doi: 10.69587/sdc/3.2023.44.



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of copyrighted materials. It is found that remote access to library databases will face a number of challenges related to copyright protection. The results of this study have practical value for libraries, research institutions, educational institutions, local government bodies in the context of implementing remote access to sources, materials, and books. The research materials are important for further scientific research in information and library science, document and information communications, public administration, and administration

Keywords: information technologies; digital services; online visits; development of library affairs; digitization

Introduction

The development of information technologies necessitates a reevaluation of approaches to library, publishing, and press activities. Global experience shows the necessity of applying cutting-edge technologies in library affairs. Digitization in Ukraine has achieved certain successes, and efforts are being made to adopt the experience of implementing this process in several European countries. The process of providing remote services by libraries in Europe and North America is significantly more advanced, and therefore valuable for improving the national system of electronic library resources. It is important for Ukrainian libraries to assess the experience of Western countries, which will both provide impetus for development and revitalize their activities. In this context, configuring remote access, developing optimal approaches to the use of information resources on social media platforms (Social Media Management or SMM), and establishing remote access library operations play crucial roles. Understanding the importance and role of social media in promoting library resources, disseminating knowledge, adapting humanity to new learning methods, and acquiring skills is essential. This issue became particularly relevant during the COVID-19 pandemic and the onset of full-scale Russian-Ukrainian war. Understanding the future realities of post-war Ukraine, where the speed and quality of disseminating and acquiring new knowledge will play a key role in the country's recovery, is especially important. Simultaneously, studying the experience of implementing remote services by libraries worldwide over the past decades is crucial, as understanding the trends of these processes in other countries will facilitate the qualitative reform of the system for providing remote services by Ukrainian libraries.

Given the relevance of remote work in the current stage of global development, the theme of remote services provision by libraries has been studied by a number of foreign and Ukrainian researchers. Even before the onset of the coronavirus pandemic, a group of scientists emphasized the need to transition from traditional methods of library service provision to modern ones, considering the development of information technologies. A. Rzhyskyi (2022) characterized the process of using remote access, remote work, and education in practice, highlighting their strengths and weaknesses. Similar aspects were addressed in the work of N. Tereshchenko (2020), who noted that modern technologies improve the development of education and facilitate

access to sources of information. In her opinion, this was particularly relevant in the context of the pandemic. H. Xiao (2022) studied the electronic library as a system of digital information resources supported by modern high technologies, a model of information resource management of a new generation on the Internet, and a result of digitizing library collections. With the development of society and the accelerated pace of people's lives, who cannot spend too much time on book classification and search, studying the classification of books and quick search in university libraries becomes very important. The author investigates and analyses the classification and quick search of books in university libraries using algorithms and methods of digital information technologies, thereby finding the best algorithm.

T. Kolesnikova (2020), who also addressed the challenges of the pandemic on library development and remote work organization, not only revealed the mechanism of implementation and functioning of distance activities but also illuminated the strategy of adaptation in the post-COVID period. Characterizing the development of the European library network, R. Tavares (2023) notes that in recent years, EU libraries have become not only centres for preserving knowledge but also centres for learning that embody the concept of Europe's history and future. O. Maciej & S. Molchanova (2022), studying corporate library interaction, noted that the implementation of new computer technologies, particularly significant for scholars during the coronavirus and in conditions of full-scale war, is essential. As aptly noted by Y. Chumak (2022): "digitization stimulates the general trend of transforming Ukrainian public libraries into hubs for comprehensive processing of all types of information on all media". That is, it is progress in the development of library affairs, which gradually transforms the library, in the classical sense, into a centre for processing information, providing it, consulting, and so on. D. Holcer *et al.* (2021) conducted a comparative characterization of the adaptation experience of Croatian and Ukrainian libraries during the pandemic, identifying the most optimal features for the development of a modern network society. In the process of innovative educational development, an important factor in its modernization is information and library support, which L. Berezivska *et al.* (2023) consider as purposeful activity aimed at creating digital information resources and providing access to them based on the widespread use of modern information and

computer technologies to meet the needs, informational needs of users – education recipients, pedagogical, scientific, and scientific-pedagogical workers.

In the face of modern challenges, questions about the remote work of libraries, providing non-traditional services for institutions of this type, using interactive technologies aimed at the development of education, science, civil society, democratic progress, and so on, are quite relevant. The purpose of this article was to conduct a comparative analysis of the features and world experience of the formation and development of remote access usage in library activities in European and North American countries, characterizing its effectiveness and prospects for its application in Ukraine.

Materials and Methods

The study involved a detailed examination of a series of scientific works, materials, and library website analyses, which allowed for a comprehensive understanding of the specified topic. By applying specific methods of scientific cognition, the concept of this article was formed, which is based on the principles of objectivity and reliability. The following methods were used during the research: synthesis, comparative and source analysis, content analysis. Forming key conclusions regarding the research results involved the use of the synthesis method. Synthesis was carried out based on a detailed study of existing scientific works and documents. Comparing the experience of implementing remote access services in world and Ukrainian libraries is possible under the condition of applying comparative analysis. During the study of the features of implementing advanced technologies in the British Library, the Royal Library of the Netherlands, and the Ottawa Public Library, the most significant achievements in providing remote services were identified, and accordingly, the importance of this experience for Ukrainian libraries was noted. Source analysis involved a detailed study and evaluation of sources and materials on the research topic, in particular. During the application of source analysis and content analysis, the tendency of visitation and utilization of remote services in the British Library was established.

In the research, reports, programs, and reviews dedicated to the activities of world libraries were collected. A series of reports from the British Library were used to understand the trend of remote access usage by readers. Additionally, a prominent place is occupied by the first European overview of electronic lending in public libraries, outlining trends in electronic lending services, the relevance of their usage, and so forth. The article utilizes a report from the Association of European Research Libraries (LIBER, 2020), which clearly characterizes how libraries adapted to functioning in the conditions of COVID-19. The "Digital 2023: Global overview report" by S. Kemp (2023) allows understanding the trends in digital technology development at the present stage. Data on the dynamics of digital service provision by the British

Library were obtained from its annual reports from 2016 to 2023 (British Library, 2016; British Library, 2023). In addition to the mentioned materials, the work analysed the Development Strategy of Library Affairs until 2025 "Quality Changes of Libraries to Ensure Sustainable Development of Ukraine", which was approved according to the Cabinet of Ministers of Ukraine order No. 219-r (2016).

Results and Discussion

The development of information technologies has shifted priorities in information seeking among people. There is a gradual departure from traditional information sources (books, press, television) to modern ones (social networks, electronic resources, video content). As noted by experts from "We Are Social" and "Hootsuite" in their annual reports, the number of internet and social media users is increasing. The amount of time individuals spend consuming news from electronic resources or social media is also increasing. As of January 2023, the number of internet users reached 5.16 billion people (64.4% of the total population), and social media users numbered 4.76 billion people (59.4%). Compared to 2022, these figures increased by 1.9 and 3%, respectively. On average, each person spends over six and a half hours per day on the internet (Kemp, 2023). Considering these data, it is important to understand that it is easier and faster to find the necessary information not within the walls of specialized institutions but on the internet. Accordingly, since the beginning of the second decade of the 21st century, a number of world libraries have been implementing innovative approaches to their activities.

The process of developing the digital (networked) society was accelerated by the coronavirus pandemic. If before the pandemic, remote work was a privilege for workers in certain sectors (IT, journalism), then under strict quarantine conditions, remote work became a priority in the labour market. The formation of an adequate information infrastructure for businesses was dictated by survival in crisis conditions and ensured effective operation in the future (Vyas, 2022). Consequently, the number of social media users, online work platforms, and hours spent on the internet are increasing. However, despite remote work and remote access to necessary information becoming the norm, there are still a number of issues that require careful study, including cybersecurity, adaptation of national legislation, reduction of social communications outside the networked society, and so on. In the post-COVID period (and in Ukraine after the war), libraries can become a platform both for remote work and for personal socialization.

Continuous information flow has led to changes in library service technologies and a gradual transition to interactive information-seeking methods by users. Modern world libraries offer a wide range of remote services. Among the main global trends are digitization and open access publication of documents, electronic delivery of materials, issuance of electronic documents or

reader tickets, ordering and reservation of literature on shelves, e-governance, support for scientific and business projects, and more. At the current stage of information technology development, there is a gradual departure from the classical understanding of the concept of a "library" as a repository of books to perceiving it as a powerful information electronic resource. Adding any valuable information to electronic databases allows users to quickly find and work with the necessary sources. The transition from traditional libraries to electronic ones is explained by the term of preservation, reduction of storage space for printed materials, increased speed of providing information for use, and the non-obligatory nature of physically visiting the library. The only condition is the availability of remote access services, electronic databases, and digitized materials in the library. Printed publications are limited by the lifespan of the paper they are made from. The electronic counterpart of a printed publication can be stored virtually indefinitely and used without restrictions, provided periodic rewriting onto new information carriers (Andreev, 2014). The advantage of such libraries is their convenience, as anyone with internet access can use them.

In many countries around the world, the library has become a kind of intermediary between society and government, leading to the formation of e-governance projects. Thanks to the development of information technologies, citizens of various countries can, without intermediaries and without leaving their homes, ask questions to officials, familiarize themselves with government decisions and local self-government, and process necessary documents, among other things. The library has become the main centre for implementing e-governance projects in the USA, European countries, and the Baltic states, where services in this direction are provided via the internet. However, they play a significant role in e-governance for remote users, particularly on library websites where links to documents or government portals are placed. Additionally, in the Baltic states, the practice of remote access to e-governance services for persons with disabilities is widespread (Gich *et al.*, 2013). In the context of hybrid threats, the coronavirus pandemic, and geopolitical shifts during the years 2022-2023, online technologies played a significant role in diplomatic relations. Social networks, in particular, changed the space in which diplomats cooperate, communicate, and interact, replicating the logic of diplomatic institutions in the network (Bjola & Manor, 2022). Starting in 2021, 39 teams from 16 European countries launched initiatives aimed at developing libraries as democratic spaces (The Europe Challenge, n.d.). Thus, the library is perceived not only as an institution where knowledge is accumulated but also as a public institution aimed at promoting the development of democratic society. Obviously, the civil society of European countries seeks to use library resources for the development of democracy, activation of society, dialogue with authorities, promotion of

education, especially inclusive education. Considering this, it is conceivable that in the near future, thanks to the use of library electronic resources, a number of countries will be able to provide remote services for citizens to engage in dialogue with state or civil institutions. Libraries and their online services can become a bridge between society and the state. Especially in the context of modern challenges in a globalized society (terrorism threats, hybrid warfare, Russian aggression in Ukraine, COVID-19), and the likely emergence of new challenges in the future, remote services will have significant importance for the security of every citizen and society as a whole. However, in this context, the global community must ensure information and cyber security.

Modern web technologies are developing rapidly. The international publisher "SAGE", together with the British Library, emphasizes the change in traditional cataloguing and metadata creation on a Web scale. During the years 2010-2011, libraries in Canada and the USA first utilized Web Scale Discovery systems. It is designed to consolidate all information resources, both licensed and open access, into a single search system (Zhuravleva, 2016). However, the Web Scale Discovery service differentiates between publicly available search results, so a registered user will be able to separately access publicly available data or licensed data if the library within the system has the right to provide them (Breeding, 2014). In the following years, online data cataloguing gained momentum, and the coronavirus pandemic accelerated the process of fully utilizing online catalogues and resources.

Electronic collections of various publications are stored on websites and can be used for reference or as sources for scholarly work. In particular, on the British Library's electronic portal, under the section "Catalogues & Collections", scanned documents are posted, some of which are rare. They are uploaded online for preservation and public use. In the absence of an electronic version of a document, a reader can request digitization of the necessary source. A similar procedure is in place at the Wrocław Library. After making the appropriate payment online, a user can order an electronic copy of a document. The scanned source can only be used privately for reference or scholarly purposes and cannot be distributed. This service existed as early as 2008-2009, and today it has been refined and adapted to modern realities. The Library and Archives of Canada, up to 2017, established remote user support and improved access to collections online. Through a contract with Ancestry, approximately 25 million pages of the most popular and antique materials were digitized and made available on the institution's website. Additionally, over 26,000 books and manuscripts in various languages are available on the website. Through the "Library and Archives of Canada" portal, access is provided to the Theses Canada Portal, which contains dissertations by Canadian scholars. Access to these portals is possible through programs such as AMICUS and Archivichet, which facilitate

material search across 1,300 Canadian libraries. The Library and Archives of Canada is visited by 2,000 remote users monthly (Semesko, n.d.). According to statistics, there are an average of 1.6 million page visits to the website per month and about 20 million annually. Every month, 2,350 clients use the library's online services. Thanks to remote access, the Library and Archives of Canada provides an average of 1,750 responses per month to unofficial inquiries regarding access to confidential information and 100 to official ones. The Ottawa Public Library also organizes a series of online events and projects popular among many readers. In 2022, the library provided access to 2,376,869 electronic and audio books (Ottawa Public Library, 2022).

The British Library supports any initiatives of scientific development, as well as business. Based on the Business and Intellectual Property Centre, the library provides assistance to novice entrepreneurs (Kerzyuk, 2015). The institution's website has a "Business Support" section where users are provided with online consultations,

training, articles, and blogs that address the main issues of modern business development. Over 10,000 small and medium-sized enterprises use the resources of the British Library. The peculiarity of this service lies not only in assisting beginners but also in establishing links between entrepreneurs from EU countries and assisting in the organization and implementation of projects. Of course, support is aimed at small businesses or entrepreneurial endeavours. Regarding the latter, the library is willing to provide funding for start-ups. To do this, one simply needs to fill out a special online form.

Remote access to library services becomes a widespread phenomenon (Fig. 1). In particular, remote services of the British Library have been actively used by readers since 2019. In 2023, approximately 25.3 million visitors utilized the British Library website for various purposes (browsing, research, reading news, information retrieval, participation in programs, business, etc.). For educational purposes, the site was visited by about 9 million readers (British Library, 2023).

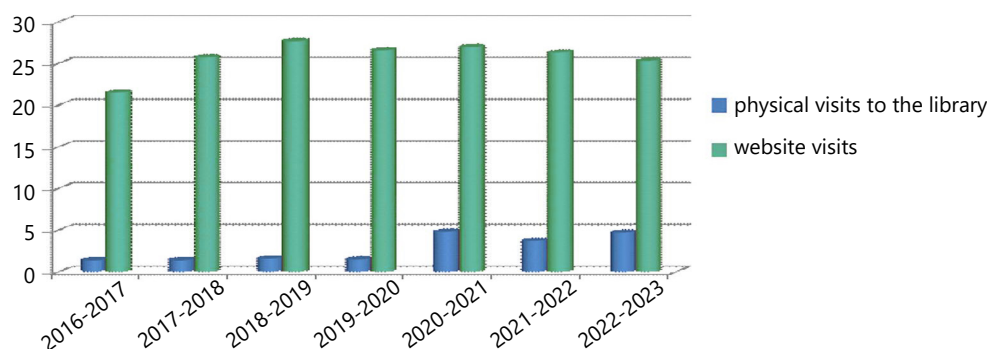


Figure 1. Change in user visits to physical and remote access of the British Library from 2016 to 2023

Source: constructed by the author based on data from the British Library Annual Report and Accounts for 2016-2023

The number of visitors to the British Library for accessing its resources is increasing: in 2016/2017, the number of physical visits to the library was 1.46 million, while website visits reached 21.5 million users; in 2017/2018 – 1.48 million physical visits and 25.7 million website visits; in 2018/2019 – 1.6 million physical visits, and 27.7 million website visits; in 2019/2020 – 1.5 million physical visits, and 26.6 million website visits; in 2020/2021 – physical visits reached 4.8 million, with 27 million website visits; in 2021/2022 – physical visits were 3.7 million, with 26.3 million website visits; in 2022/2023 – physical visits amounted to 4.7 million, with 25.3 million website visits (British Library, 2017-2023).

Additionally, in 2023, as a gesture of solidarity and support, in partnership with the National Library of Ukraine named after V.I. Vernadsky and the Embassy of Ukraine, over 16,000 books in Ukrainian or Ukrainian/English languages were distributed to library partners of the "Living Knowledge Network" program throughout Great Britain, and a series of events aimed at highlighting Ukrainian culture were organized. In particular, the British Library

hosted the "Books Without Borders" event for Ukrainian refugee children and their families, attended by the First Lady of Ukraine, Olena Zelenska (British Library, 2023).

As of 2018/2019, 148 libraries in Great Britain and over a hundred international higher education institutions utilize the electronic document delivery service. With the onset of the COVID-19 pandemic, the number of libraries providing remote document delivery services is increasing. Half of all British Library users reside outside the United Kingdom, 80% of whom are in the commercial sector. Over 30% of users who submit documents online receive their own articles through the Secured Electronic Delivery system. From 2014 to 2016, the number of consultations provided remotely increased from 2.6 million to 3.2 million (British Library, 2016). In 2017, the number of online queries increased to almost 3.7 million (British Library, 2017). A crucial indicator of the quality of remote services provided by the British Library is the satisfaction of readers' needs. According to the library's data, the number of satisfied users of remote services is increasing, with satisfaction rates as follows: in

2012/2013 – 79% of users rated the quality of remote services positively; 2013/2014 – 83%; 2014/2015 – 86% (British Library, 2014; 2015). In 2016/2017, the quality of online service provision remained relatively stable compared to previous years (2015/2016 – 88%; 2016/2017 – 87%) (British Library, 2017). In 2017/2018, the British Library set a goal to improve the quality of remote access to resources, enhance search systems, and test new document delivery models (British Library, 2017). Continuous growth in the use of online services provided by the British Library was observed from 2018 to 2023, accompanied by an improvement in satisfaction with the quality of remote services: 2018/2019 – 91%; 2019/2020 – 90%; 2020/2021 – 90%; 2021/2022 – 88%; 2022/2023 – 87% (British Library, 2018-2023). It is evident that the trend will continue to evolve in the coming years.

Throughout 2023, an additional 262,000 physical storage units were added to the British Library's collection, which now totals over 170 million storage units. Items from the British Library's collection were used nearly 82 million times through reading rooms or online, with library staff responding to almost 86,000 reference and library inquiries, assisting people in finding and utilizing the information they needed (British Library, 2023). In March 2012, the Royal Library of the Netherlands was awarded the "Electronic Library – 2012" prize, oriented towards electronic content, a broad audience of remote users, and low prices. Thanks to digitization, approximately 180,000 international publications are available to readers online. Since 2012, the library has digitized and provided open access to newspapers, journals, and books printed in the Netherlands since 1470. This approach will increase the number of remote users, thereby enhancing the reputation of the library as an educational-information centre. As of 2023, ancient works stored in the library's collections can be provided in an online format upon request.

Thus, modern world libraries, considering the advantages of remote access to their resources, have developed strategies for further development in the second decade of the 21st century, according to which the main trends in library affairs have become the creation of an electronic library, formatting electronic documents, online material delivery, virtual exhibitions, webinars, support for business projects and scientific developments through online presentations. The main task of developing remote access is to meet the needs of users around the world and create a global database to save resources and costs.

The coronavirus pandemic has become a powerful crisis that has shaken the global community. The fight against the virus and its consequences in EU countries by individual researchers is characterized as a complete failure (Sottilotto, 2022). At the same time, business structures, the IT sphere, and several other sectors of the economy attempted to adapt independently to new requirements, which to some extent allowed easing the

tasks for state institutions. The COVID-19 pandemic has made certain adjustments to the functioning of libraries in offline mode. Accordingly, remote access to information, especially scientific resources, was quite important for any individual. Scientific and sociological studies conducted by European researchers have shown that most libraries were ready to provide access to data remotely. Another key finding was the increase in the number of digitized materials. A study by the Association of European Research Libraries showed that most libraries have increased, modified, or expanded digital services. Only 22.01% indicated that the number of digital services has hardly changed (LIBER, 2020).

With the emergence of digitized books, documents, journals, as well as e-books and their commercialization, another phenomenon has arisen, namely electronic lending. The document "First European Review of Electronic Lending in Public Libraries" (as of June 22, 2022) defines "electronic lending" as a privileged status of operations with electronic libraries regarding copyright laws, legitimization of open access practice through ordinary fair use (EBLIDA, 2022). Thus, the main drawback of open access to electronic resources is the likelihood of copyright infringement. Accordingly, a number of information resources, books, publications are paid. The mentioned document reveals the practical side of applying electronic lending in a number of countries, namely providing remote access to individual materials with the regulation of all legal aspects. For example, in 2021, Danish libraries had 7.8 million transactions (80,000 titles) of electronic lending (EBLIDA, 2022). Paid access to electronic books, publications, audiobooks is one way to protect copyright, and accordingly, authors and libraries earn by providing access to them. Similar trends will take place in Ukraine considering the European integration processes.

Libraries in Ukraine also provide remote services. To a greater extent, this is associated with digitizing books, sending document copies, searching for materials, and so on. Moreover, electronic catalogues have been introduced to facilitate the search for necessary literature for readers. In 2016, the Cabinet of Ministers of Ukraine approved the Strategy for the Development of Library Affairs until 2025, "Quality changes of libraries to ensure sustainable development of Ukraine" (Order of the Cabinet of Ministers No. 219-2016-p, 2016). One of its points was the creation of a unified web portal of library information resources in Ukraine, as well as the envisaged joining of the World Cat global catalogue (Zhuravleva, 2016). The inclusion of domestic libraries in this system will have several advantages: firstly, users through Ukrainian library resources will have access to global databases, thus saving time on searches; secondly, there is no need to travel outside the country to search for information, which saves money on travel.

The significant impact on the development of remote services of Ukrainian libraries was made by the COVID-19 pandemic. However, the adaptation of work

in remote mode had chaotic features and at the initial stages created a number of obstacles for readers and employees. It should be noted that in the remote mode, libraries provided such services as assigning universal decimal classification, electronic document delivery, virtual reference, online consultation with a bibliographer, systematic information on a topic, formation of bibliographic lists, provision of services for organizing and/or conducting events (Rzheuskyi, 2022). However, even libraries of the national level had the opportunity to provide not all services, not to mention institutions at the regional, district, or municipal level. The full-scale military aggression of Russia actualized the need for remote servicing of users, taking into account the threats of missile attacks. The practice of remote access during the coronavirus pandemic is also applied in the realities of war, although improvements and implementation of new forms of remote work are taking place.

In the realities of the pandemic and the Russian-Ukrainian war, remote services of Ukrainian libraries become relevant for scientists, teachers, students, journalists, politicians, and military personnel. From the perspective of the development of Ukrainian society in wartime conditions and later during post-war perestroika, the quality of education, the speed, and quality of acquired knowledge are the key to the restoration and development of Ukraine. The experience of the British Library confirms the importance of online visits. The growth of remote use of library services is possible only under such conditions: media coverage and quality provision of online services. Ukrainian libraries should not only preserve and disseminate knowledge but also become a platform for integrating society, a centre for providing alternative education, a hub for the development of start-ups, support for businesses, politicians, scientists, and journalists. The experience of the British Library is optimal for the practical implementation in the national libraries of Ukraine. Digitization of funds and providing open access to them is just the first step. The post-war and post-COVID periods will necessitate the establishment of social communications in society as one of the elements of unity. Libraries can become centres where relevant projects can be implemented both remotely and in person. Considering the challenges of information security in the modern world, contemporary libraries can perform the function of scientific centres that deal with studying information threats, developing mechanisms for protection, and disseminating the basics of information hygiene among the population. The results of the research have practical value for libraries, scientific institutions, educational institutions, local self-government bodies in the context of implementing remote access to sources, materials, books. The materials of the article are important for further scientific research in the field of information and library affairs, social and documentary-informational communications, public administration, and administration.

The issue of remote access is becoming increasingly relevant. A number of scholars, resorting to empirical methods, seek to identify the advantages and disadvantages of remote work and open access to information sources. In the context of the Russian-Ukrainian war and hybrid challenges facing the EU and NATO countries, the value of information space security should be understood. In today's realities, civil society and state security structures are engaged in combating Russian propaganda. However, it is important to involve research centres for more effective action in the information field. Ukrainian scientific libraries, institutes, and universities, which have the appropriate professional level, can become centres of scientific and expert support and create a system for disseminating truthful, scientifically substantiated information among Ukrainian society and the global community. This point of view is supported by Y. Novalska (2022), who believes that the main tasks of public libraries in the conditions of the Russian-Ukrainian war are to protect the information space, create the National Digital Library of Ukraine, informational and educational work, provision of online support, organization of library services, volunteer projects, charitable activities, including assistance to the Armed Forces of Ukraine. The library should not only fulfil its traditional function but also a range of alternative functions, especially in crisis conditions (pandemic, war). The development of alternative functions can be useful in the post-war years.

Modern geopolitical challenges, caused not only by the exacerbation of conflicts in various parts of the world but also by the spread of the pandemic, only emphasize the importance of library online services. The pandemic has created a new reality where remote work is a familiar norm of professional life (Obenauf, 2021). However, remote access is a challenge for such areas as education and science, at least in Ukraine. For example, N. Tereshchenko (2020) emphasizes the challenges of the spread of coronavirus for the development of education. However, as noted by T. Kolesnikova (2020), most Ukrainian libraries were not fully prepared to switch to remote work. While some global libraries, educational institutions, and research institutions practiced remote forms of work on certain platforms. However, in the pre-pandemic period, this did not become widespread. In Ukraine, this practice began in the conditions of the pandemic. Of course, the issue of online education arose before the appearance of COVID-19, but only the pandemic for the first-time tested distance education. Ukrainian society is convinced that online education only leads to degradation and has negative quality. It is partially correct. However, there is another point of view, which has recently been prevalent in the information space, namely, about the higher quality of alternative education (mostly in online format) compared to traditional education. Of course, this is only a hypothesis based on the successes of a motivated

population. But this also suggests the idea of creating online courses, platforms for relevant specialties based on libraries. It is also important to use the experience of European libraries, which organized online events, exhibitions, lectures, etc., as noted by Z. Ponomarenko (2020). Analysing the challenges of distance learning and the place of libraries in this process, researchers I. Kirichok & T. Pavlenko (2021) noted that it remains relevant to review the library's work system in providing remote educational services. For this, it is important to use innovations tested in other countries. Perhaps it is even worth using the experience of transforming foreign classical universities into new ones (for example, creating massive online courses based on cloud technologies, including Coursera, Edx, Open Science, etc.) (Kiriienko, 2023). International library cooperation as a comprehensive system of interconnected areas of activity between libraries and foreign partners aimed at using the best practices and solving such problems as quality resource and functional support of user services, borrowing the best experience for the effective implementation of Ukraine's state policy in the field of informatization, as well as corporate solutions to global information and communication problems of the world community are considered in their monograph by V. Medvedeva & O. Shendryk (2020). The authors of the study, realizing the importance of the book and the library in shaping the worldview of the individual and the impact of public consciousness on social, intellectual, cultural, and artistic processes, consider the main strategy in these conditions to be the search by Ukrainian libraries for concepts of national identity and self-identity to overcome intercultural, informational, and cultural isolation.

A group of scholars conducting a comparative analysis of the operations of Ukrainian and Croatian libraries during the coronavirus pandemic noted that with the onset of quarantine announcements, the number of users on social media sharply increased. At the same time, Croatian libraries actively engaged on social media platforms by providing information on the latest news, online services, and partially serving as an alternative for leisure activities during the pandemic (Holcer *et al.*, 2021). Thus, social media should become an auxiliary factor in the development of remote library services. To achieve this, it is important to synchronously develop the informational aspect and implement new technologies and methods, following the example of the British Library or the Royal Library of the Netherlands, while also taking into account the current realities of the Russian-Ukrainian war.

Conclusions

Therefore, considering the contemporary challenges facing the globalized world, remote access to information emerges as an important practical means of addressing a range of educational, scientific, technical, political, and

economic issues. Since the beginning of the 21st century, global libraries have embarked on the process of adapting to modern challenges and effectively fulfil not only the classical function of knowledge accumulation and preservation but also serve as a hub for individual communication with civil society or the state, facilitating the integration of new technologies into the scientific sphere. Advanced technologies have been actively implemented in global libraries for several decades and currently play a significant role in library communication with readers, civic associations, businesses, government institutions, and more. Global experience confirms the effectiveness of remote work, and the onset of the coronavirus pandemic only confirmed the further development of remote service delivery tools.

The issue of remote access has become increasingly relevant in recent years, characterized by the widespread adoption of telecommunications tools in library work, the emergence of electronic full-text editions, the creation of proprietary electronic collections, and the development of corporate library systems, among other factors. Libraries today have become an effective platform for self-study and online learning, with users actively seeking digital forms alongside traditional books, using information-interactive technologies and various Internet resources as search tools. At the same time, organizing outreach exhibitions, creating global information resources, book presentations, and publishing projects popularize cultural heritage and libraries.

The search for a new paradigm of library activity in the Ukrainian library community is based on the recognition that the comprehensiveness, completeness, and quality of document and information resources concentrated in libraries and provided to users depend significantly on international information cooperation. International library cooperation allows for the study of the experience of intercultural cooperation, the development of concepts of effective communication links in national and global systems; the introduction of systemic organizational, structural, and technological changes in line with global trends; adaptation of national legislation to international standards in the library-information sphere; improvement of funding, staff training, modernization of technical and material equipment; expansion of library participation in international projects, grant receipt, corporate cooperation, etc.

Furthermore, it is important to actively study the dynamics of changes in Internet network users, social networks, the number of hours spent daily browsing news online, and seek optimal measures to popularize library affairs. To achieve this, particular attention should be paid to the specifics of working in social networks, searching for approaches to establishing communication with the user, and more. In practical terms, global library work experience and forming relationships with society will allow for the effective use of library resources.

Acknowledgements

None.

Conflict of Interest

None.

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Ефективність надання послуг віддаленого доступу світовими бібліотеками

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Анотація. В умовах сучасних викликів та збільшення попиту на цифрові послуги досить актуальними є питання дистанційної роботи бібліотек, використання інтерактивних технологій, спрямованих на розвиток освіти, науки, громадянського суспільства. Метою цього дослідження є вивчення світового досвіду використання віддаленого доступу у діяльності бібліотек, історичні особливості становлення і розвитку дистанційних послуг бібліотечних послуг у країнах Європи та Північної Америки, характеристика ефективності й перспективи його застосування в Україні. Під час дослідження були застосовані методи узагальнення, компаративного і джерелознавчого аналізу. Висвітлено особливості функціонування віддаленого доступу світових бібліотек, розкрито його ефективність, переваги та недоліки. Охарактеризовано розвиток інформаційних технологій та їх вплив на книговидавництво, відвідуваність бібліотек, наукову діяльність, обмін досвідом тощо. З'ясовано тенденції розвитку світових бібліотек. Встановлено, що для більшості європейських бібліотек пріоритетним напрямком стало оцифрування і відкриття доступу до книг, преси, документів, архівів. З'ясовано, що віддалений доступ прискорює наукові дослідження. У другому десятилітті ХХІ ст. відбувається зростання онлайн відвідувань бібліотечних фондів. Висвітлено розвиток надання віддалених послуг українських бібліотек, а також основні тенденції розвитку цього процесу в умовах російсько-української війни. Розкрито значення захисту авторських прав в умовах надання віддаленого доступу. Одним із заходів стало запровадження електронного кредитування (e-lending), який передбачав отримання оплати за використання авторських матеріалів. З'ясовано, що віддалений доступ до баз даних бібліотек матиме низку викликів пов'язаних із захистом авторських прав. Результати цього дослідження мають практичну цінність для бібліотек, наукових установ, освітніх закладів, органів місцевого самоврядування у контексті реалізації віддаленого доступу до джерел, матеріалів, книг. Матеріали дослідження є важливими для подальших наукових досліджень з інформаційної та бібліотечної справи, документно-інформаційних та соціальних комунікацій, публічного управління та адміністрування

Ключові слова: інформаційні технології; цифрові послуги; онлайн-відвідування; розвиток бібліотечної справи; оцифрування



The role of digital technologies in improving library and information communication: Trends and challenges

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Abstract. The relevance of the study is driven by the rapid development of digital technologies and their significant impact on all areas of life, including the library and information field. Digital resources and online services are increasingly displacing traditional printed media, necessitating the transformation of libraries to maintain their relevance and competitiveness. The aim of the research is to examine the impact of digital technologies on the library and information field, identify their potential, and identify challenges arising during this transformative transition. Various methods were employed during the study, allowing for a deep and comprehensive understanding of the process of digital transformation in the library and information field. The application of a comprehensive methodological approach, which included literature analysis and the involvement of various sources of information, enabled a thorough investigation of the issues. Comparative analysis of approaches allowed for objective conclusions and recommendations regarding the optimal implementation of digital innovations in this field. The research results indicate promising opportunities for using digital technologies to optimize communication and expand user capabilities. Key aspects of the impact of digital technologies on the library and information field were identified, highlighting their importance in the context of the modern information landscape. Trends and challenges associated with digital innovations were analyzed, revealing significant changes in the functioning of libraries and the transformation of their role. The question of the adequacy of libraries to modern requirements and the need to develop development strategies were raised. It was clarified that the further development of the library and information field will be determined by prioritizing digital innovations and flexible adaptation to changes in the information environment. The conclusions and recommendations obtained have practical significance

Suggested Citation:

Pluzhnyk, O., Berezanska, I., & Drok, P. (2023). The role of digital technologies in improving library and information communication: Trends and challenges. *Society. Document. Communication*, 8(3), 55-65. doi: 10.69587/sdc/3.2023.55.



for contemporary librarians, drawing their attention to the importance of adapting to the digital environment. Considering the dynamics of the information society, the focus on preparing librarians to use advanced technologies determines their successful adaptation to new challenges

Keywords: digital tools; library and information activities; communication in the library field; the role of librarians in the digital society; modern transformations in libraries

■ Introduction

In the modern digital world, where technological innovations drive the development of various fields, the library and information sphere do not remain untouched by transformations. Digital technologies not only change the means of storing and disseminating information but also define new directions in interaction between libraries and users.

The development of the information society presents new challenges and trends for libraries, which become centers of access to knowledge and cultural heritage. Digital technologies accelerate and simplify the interaction between libraries and users. The transition from traditional to digital service delivery opens up unlimited opportunities for accessing information and promotes extensive knowledge exchange. Considering the wide range of studies conducted by researchers at the national and international levels, key aspects defining modern trends in this field can be identified. The growing role of digital technologies, their impact on library work, and new requirements for professional skills of librarians are the focus of researchers' attention.

V. Dobrovolska & L. Cherednyk (2023), studying global experience, note that a significant stage in the development of libraries and meeting users' information needs is the necessity of creating information and library networks, as well as actively seeking and implementing new forms of work. This will contribute to improving the efficiency of library services and meeting the needs of modern society for access to quality information. I. Rozman & A. Petrova (2023) emphasize that modern trends in the development of information technologies in library and archival affairs are focused on innovations that facilitate access, ensure effective storage, and organization of documents and archival materials.

Research conducted by D. Holcer *et al.* (2021) indicates that the challenges arising from the COVID-19 pandemic have significantly increased the level of digitization in Ukrainian libraries and led to significant changes in their activities. Libraries quickly adapted to the new conditions by providing their users with various remote services to ensure uninterrupted access to information and resources during remote work. These changes demonstrate the flexibility and high responsiveness of libraries to contemporary challenges. I. Borodai *et al.* (2022), analyzing the current activities of libraries, point out their main priorities, including the development of electronic products, improvement of search strategies, digitization of documentary resources,

and implementation of innovative methods of information security to ensure effective access. L. Wilms (2021) emphasizes the necessity for libraries not to limit themselves to traditional library functions, such as providing physical collections and supporting information literacy. The researcher believes that libraries should actively expand their activities, acting as publishers of their digital collections and providing necessary expertise for publishing this data. This leads not only to changes in the internal structure and operation of the library but also transforms relations with the scientific community. Such an approach opens up new opportunities for libraries as active participants in shaping and disseminating digital knowledge.

The mentioned studies make a significant contribution to the development of the library and information field, contributing to the understanding of key aspects of digital transformation. They also highlight the need for continuous improvement of librarians' skills and adaptation of libraries to the challenges of the modern information environment. Such scholarly discourse reveals essential aspects of using information technologies in library and archival work. From the integration of new technologies to changing approaches to storing and accessing information, each study contributes to understanding how libraries adapt to contemporary demands. However, the rapid technological advancement and dynamic societal changes raise new questions that need to be addressed. It is important to remember the constant need for adaptation to new challenges. The conclusions and recommendations identified in the studies become important steps towards further research and the improvement of the contemporary library and information sphere. Considering the diversity of modern trends in the development of the library and information field, this topic requires deep and detailed examination. Analyzing current innovations and challenges associated with the use of digital technologies in the library environment is crucial for understanding the impact of these changes on information communication.

The aim of this research is to thoroughly analyze the impact of digital technologies on the library and information field, identify their potential for improving communication, and determine the main challenges arising during this transition. The task of the work is to systematize scientific sources and conduct an analysis of examples of digital technology implementation in library work. The choice of research methodology included

various methods, contributing to a deep and comprehensive understanding of the process of digital transformation in the library and information sphere. The application of a comprehensive methodological approach, including the analysis of literature and the involvement of various informational resources, allowed for a detailed study of the problem, which not only helped to generalize existing theoretical knowledge but also ensured the acquisition of new empirical data, including viewpoints and perspectives of experts from different countries and fields of activity. Comparative analysis of different approaches allowed for objective conclusions and recommendations regarding the optimal implementation of digital innovations in this field, which became an important step in improving the efficiency and competitiveness of the library and information environment.

The scientific novelty of the article lies in updating the understanding of how modern technologies define the role of libraries in the virtual space and what challenges they pose to contemporary librarians. By analyzing trends and challenges in the context of digital innovations, the article aims to uncover the prospects for further development of the library and information sphere.

Transformation of libraries in the digital age

In the context of dynamic sociocultural transformations, the role of libraries as a key factor in the accumulation and transformation of knowledge becomes increasingly relevant. These institutions have served as information repositories for centuries, providing access to knowledge and contributing to the development of individuals and society. Libraries not only preserve knowledge but also actively transform it, making it accessible to the general public. This is achieved through cataloging, digitization, information popularization, as well as through educational and cultural programs.

The Law of Ukraine No. 684 (2018) provides the following definition of an electronic library: "a universal centralized information system designed for the accumulation, ordering, accounting, processing, storage, use of electronic document collections, and their management, serving visitors and users of the library through telecommunications networks in a manner that guarantees compliance with intellectual and property rights".

S. Ivanova *et al.* (2022) note that the concept of an "electronic library" (digital library) first appeared in 1994 as part of the NSF/DARPA/NASA Digital Library Initiative. Initially, the term "virtual library" was used synonymously with a digital library. However, over time, it acquired a different meaning and now describes libraries that are virtual in a broader sense (e.g., libraries that aggregate distributed content). In the early stages of the development of digital libraries, there was a debate about the similarities and differences between the terms "digital" "virtual" and "electronic".

Leading countries worldwide have launched global initiatives to create electronic libraries, including the World Digital Library project initiated by the Library of Congress with UNESCO support. The goal of the WDL is to promote international and intercultural understanding. This resource provides access to the richness and diversity of the world's cultural heritage in an open and multilingual format. Among the content presented are manuscripts, maps, sheet music, recordings, rare and valuable books, films, photographs, drawings, and more (Library of Congress: World digital library, n.d.).

In the era of digital technologies, libraries undergo significant changes. The introduction of electronic catalogs, online libraries, artificial intelligence, and other innovations opens up new opportunities for information work. It is important to understand that the role of libraries is not limited to the storage and provision of information. They play a significant role in the development of individuals and society. Libraries become catalysts for intellectual growth, providing access to information and creating conditions for development and interaction. Their role in society will only grow, as knowledge becomes an increasingly valuable resource. To meet the challenges of the time, libraries need to constantly evolve, implement new technologies, expand the range of services, and strengthen partnerships.

Under the influence of significant factors such as globalization, digitalization, and the Russo-Ukrainian war, the systemic transformation and functions of libraries are shaped by the socio-political and socio-economic level of development of Ukrainian society. The conditions of the digital age, with the continuous growth of information volumes and documentation resources, allow libraries not only to preserve their key role in the information-communication structure of society but also open up new prospects for national revival in the fields of culture, education, and science as the basis for the country's economic development.

In the conditions of the COVID pandemic, the practice of library digitalization becomes especially relevant, contributing to providing the population with access to information, opportunities for self-education, and the use of advanced technological developments. This process also leads to the transformation of libraries in accordance with the requirements of different generations, forms a new focus on digitalizing library practice, and changes the nature of library activities.

S. Sujood *et al.* (2023) also note that after the lockdown resulting from the COVID-19 pandemic, libraries and information centers found themselves in a particularly challenging situation. The unexpected situation required library staff to demonstrate ingenuity and responsiveness to ensure continuous access for users to necessary information and resources while adhering to epidemic prevention measures. In response to this challenge, librarians began actively using digital technologies to provide remote access to their services. This

decision allowed libraries to remain active and accessible to users, even during periods of quarantine and social distancing. In particular, library staff began to provide electronic access to book collections, databases, scientific journals, and other resources, ensuring a continuous flow of information for study and research. This strategic step allowed libraries to establish themselves as key information resources, even in quarantine conditions. In addition, digital access expanded the audience of users, reaching not only local residents but also those at a distance. According to the authors, this approach has proven to be not only effective in preserving the activity of libraries but also opened up new opportunities for the development and improvement of electronic services in the future.

The modern Strategy for the Development of the Library Sector defines strategic directions of activity in conditions of change. These directions are aimed at achieving a number of important goals, such as consolidating society through the affirmation of common values, adhering to European standards, and integration into the European community, which promotes the exchange of ideas and cultural understanding. In addition, the strategy aims to improve the quality of life of citizens by providing access to important information resources and cultural assets, as well as ensuring equal access to information and knowledge for all segments of the population. These priorities are aimed at supporting the development of society and ensuring the harmonious integrated development of citizens (Order of the Cabinet of Ministers of Ukraine No. 219, 2016).

A significant part of the structure of library and information activities is occupied by cultural and artistic events, which include various cultural and artistic initiatives (Makarova, 2023). Among them, it is worth noting book and thematic exhibitions, art exhibitions that represent a synthesis of library and museum exhibits, revealing unique aspects of cultural heritage. Lectures, scientific conferences, and meetings contribute to the exchange of knowledge and stimulate the intellectual development of the audience. Library marathons and events of this kind create a platform for active community participation, supporting interest in reading and cultural events. All these initiatives not only enrich the cultural space but also actively contribute to the development of the library sphere as a center of cultural and educational activities in modern society.

Over the past decade, libraries have undergone significant transformations driven by the influence of information and communication technologies (ICT). These changes have had a profound impact on all aspects of library activities and have required librarians not only to possess key skills in information processing, management, and provision of information services but also active readiness for continuous learning and acquisition of new competencies, such as the use of computer and web applications. This period of transformation has

proved to be not only a challenge for librarians but also a unique opportunity for their professional growth. The implementation of innovative technologies in library activities has opened up broad prospects, allowing them to apply acquired skills in various fields of human endeavor.

I. Rozman & A. Petrova (2023) concluded that modern trends in the development of information technologies in library and archival affairs include various innovations and changes aimed at facilitating access to information, efficient storage, organization, and dissemination of documents and archival materials. Among the most important directions of development, one can highlight the introduction of modern digital technologies to ensure open and convenient access to collections, the use of intelligent systems for information organization and retrieval, as well as the application of artificial intelligence tools for automating processes of data processing and analysis. Additionally, the development of electronic archives, virtual libraries, and platforms for efficient document exchange opens up new opportunities for the rapid and flexible dissemination of knowledge and information in modern information society.

In today's information society, where the exchange and access to knowledge play a key role, libraries perform an integral function as centers of information-cultural interaction. Library-information communication, encompassing a wide range of interactions between libraries and the public, users, and professional communities, becomes a key aspect of the successful functioning of the library environment. Library-information communication is a system of interaction and information exchange between libraries, users, and other participants in the library process. This type of communication involves effective information exchange regarding access to library resources, services, events, news, and other aspects of library activities. Library-information communication includes various forms of communication, such as announcements, advertising, consultations, interaction at events, and other formats. An important aspect is the use of various communication channels, such as electronic resources, social networks, lectures, exhibitions, etc., to reach the maximum audience and increase users' awareness of library services and resources.

I.O. Davidova & O.Y. Maryina (2018) identify five levels of digital modernization of domestic libraries. At the first level are libraries that do not implement innovations in digital technologies. Mostly these are small libraries, rural branches, school libraries, etc. The second level comprises those adapting to the digital space, but initiatives are fragmented and not aimed at interacting with users. The third level includes libraries that recognize the need for digital modernization but implement it only through individual initiatives. The fourth level consists of institutions with managed adaptive activities in the digital environment, with a clear focus on the development of digital products and interaction with the audience. At the fifth and final level are libraries that successfully



implement a strategy of digital modernization and have a wide range of innovative products. According to the authors, the majority of libraries (mostly small, rural, and school ones) are at the first three levels, where the implementation of digital technologies is fragmentary and lacks a clear strategy.

■ New challenges for librarians

M. Tolmach (2022) identifies that in the library field, both in Ukraine and abroad, updated profiles of professional activities of library specialists are being developed, taking into account the challenges of digital transformation. Moreover, new “digital” professions are introduced, such as digital transformation manager, web content and community manager, community interaction and engagement specialist, within this field.

P. Kazimi *et al.* (2023) assert that the information paradigm opens up numerous new opportunities for librarians in service delivery through the use of advanced web technologies, which automatically expand access to new areas for bridging this gap. New trends and challenges related to modern technologies create “challenges” not only for professionals in library science and information technology but also for users, visitors, researchers, and the publishing community. New technologies open up unique opportunities for librarians to facilitate and promote user-oriented services and strengthen collaboration between libraries and their users in the digital age. Authors agree with the author that adaptation to these trends and the implementation of cutting-edge web technologies will contribute to improving the status of libraries in society.

L. Butko *et al.* (2022) believe that in the socio-cultural sphere of library activities, there is a transition from the concept of “influence” to the concept of active interaction with readers, users, and clients. In this context, it is important to anticipate the emergence of a new generation of librarian-moderators who must adapt to the new intellectual environment and be prepared to react quickly to changes in the socio-cultural environment. In our opinion, libraries that can transition to the concept of active interaction with readers, users, and clients will have a successful future.

W. Horstmann (2022) considers that librarians play a key role in expanding intellectual data curation, which is an important aspect in the modern world. They play an active role in improving metadata processing by adding a human element of control to the realm of artificial intelligence. Such an approach contributes to improving the quality of information processing and helps avoid potential errors or misunderstandings. Modern libraries act not only as catalogers and knowledge repositories but also as true facilitators of scientific communication and innovation. They introduce new forms of publication and help researchers find effective tools to disseminate their research. W. Horstmann (2022) notes that librarians act as intermediaries between modern technological

data processing and people’s ability to understand and use this information. Libraries also play a significant role in contextualizing data and information. They help create connections between various sources of information, allowing researchers to integrate knowledge and explore new perspectives for research. By providing access to scientific information to society, libraries contribute not only to the development of science but also to the increase in the level of education and understanding of the importance of scientific discoveries for the general public. This integrative approach of libraries in data processing and utilization is recognized as key to modern development in science and education.

Professionalism in today’s library profession is a necessary prerequisite for successful innovative development of libraries. This aspect should not be considered only as the ability to adapt to new technologies; it should also be viewed as a value orientation that enhances the motivation of library professionals to implement innovations. In the context of digital transformations, continuous professional development of library staff is important, which involves not only updating knowledge but also changing the way of thinking and developing skills to overcome psychological barriers when mastering new technologies and implementing innovations.

■ Main directions of library digital transformation

Analysis of modern library activities has allowed I. Borodai *et al.* (2022) to conclude that one of their main priorities is the development of electronic products, improvement of information search strategies, solving tasks of digitizing documentary resources, and implementing innovative means and methods of information protection while maintaining effective access to it. Authors agree with the author that the main technological components of modern information and library services are electronic catalogs, digital libraries, informational resources, virtual exhibitions, and selective dissemination of information systems.

V. Dobrovol'ska & L. Cherednyk (2023) note that with the implementation of modern information technologies in library activities, virtual libraries are emerging – networks for general use, oriented towards information exchange between libraries. This environment brings together geographically distant libraries for integrated communication and access to information. Documents in virtual libraries are stored in machine-readable form. Users can access resources through global network search engines even without registering with the library. The application of information and communication technologies significantly improves the process of searching and obtaining the necessary publications. Virtual libraries provide practically the same services as traditional ones, including access to catalogs, organization of searches and order lists, as well as electronic versions of publications. According to the authors, the

implementation and development of virtual libraries are an important step in the development of modern library science, which will make information more accessible to people worldwide.

Digital technologies play a key role in transforming information search processes, providing not only efficiency and speed but also expanding user capabilities. Electronic catalogs and databases have become the main tools for systematizing and organizing large volumes of information. They allow for easy and quick searches by keywords, topics, authors, or other parameters, simplifying navigation in the world of knowledge. Thanks to such technologies, users can not only quickly find the necessary materials but also access various formats of content, such as e-books, scientific articles, videos, and audio recordings. Expanding information search capabilities creates more opportunities for self-study, research, and education. This approach makes library information resources more democratic and accessible to different categories of users, promoting active learning and knowledge expansion. Search systems that use advanced algorithms and artificial intelligence actively adapt to individual user needs. They analyze previous queries and interactions, providing personalized recommendations and ensuring accurate and convenient access to information.

R.O. Okunlaya *et al.* (2022) define artificial intelligence (AI) as one of the latest technological trends in digital transformation that university libraries can successfully use to expand the range of educational services for their users. The ability of artificial intelligence to make intelligent decisions in the field of information acquisition and exchange in the context of learning and research can open up new perspectives for the library as an innovative knowledge center. A negative trend is the low level of implementation of artificial intelligence technology in libraries. This may be due to the absence of this direction in their strategic plans. Research in this aspect will not only contribute to the development of modern libraries but also stimulate professionals in the field of information science to use artificial intelligence as a tool to improve the quality and efficiency of library services. Authors see great potential in AI for the development of modern libraries. It is important for libraries and professionals in the field of information science to collaborate to use AI to improve the quality and efficiency of library services.

Research conducted by S. Taha *et al.* (2023) among students indicates their positive attitude towards the application of augmented technologies in the library. They are convinced that the use of augmented technology will not only be useful and user-friendly but also an effective means of providing them with access to a variety of library resources and services. As one can see, the research results confirm users' readiness to use augmented technologies in the library and their positive attitude towards this innovative approach.

M. Ashiq *et al.* (2022) classify new library functions into four main directions: "infrastructure, accessibility, and coverage", "awareness and well-being", "leadership and policy formation", and "human potential development". This aspect includes promoting the development of digital culture, transforming library services, focusing on website perestroika, and active presence on social media platforms. We agree with the author that the success of this process is determined by the presence of creative and visionary leadership that effectively develops policies in the conditions of the modern pandemic and new library realities. A key element is conscious digital leadership, which focuses on staff development and increasing the qualifications of library professionals by providing knowledge, experience, training, and education.

Considering the trends of the information society, where there is a growing need for access to information in online and digital formats, libraries should actively develop infrastructure and systems to demonstrate their presence on the Internet, expand access to services, meet the needs of remote users, and, most importantly, provide professional librarians with the necessary skills. High-speed Internet connection for users is also an important part of this process so that they can maximize the use of online content and library services. This step will make the library accessible to a wide range of users, promoting their educational development and increasing information literacy.

In the context of awareness and well-being, libraries play an important role in creating information literacy and supporting the psychological well-being of users. They can expand their functionality by providing psychological support services, organizing events to improve emotional health, and promoting cultural development and creativity. Leadership and policy formation involve active participation of libraries in public dialogue on important issues such as access to information, reader rights, preservation of cultural heritage, and others. Libraries can initiate discussions, contribute to the formation of public opinion, and influence decision-making at various levels.

Human potential development includes not only technical aspects but also cultural, educational, and social ones. Libraries can help expand educational opportunities, promote the development of creative skills, and provide space for social interaction and collaboration. All these directions require libraries to constantly update and adapt to changes in society and technology. Flexibility and readiness for innovation are important to ensure the effective role of libraries in shaping the modern information society. Digital technologies in the field of library-information communication have significantly changed the paradigm of library work and access to information. The main aspects reflecting the impact of digital technologies on improving library-information communication are:

Electronic resources and databases. Libraries actively use digital technologies to create and effectively manage electronic resources, expanding access to various materials. E-books, journals, audio, and video materials have become an integral part of digital library collections, providing users with the opportunity to interact with content in a way that is convenient for them. Thanks to a large number of databases, libraries ensure effective information retrieval. Users can quickly and easily find the necessary materials using various criteria such as author, topic, or keywords. This improves the quality of service and facilitates navigation in a vast amount of information.

Virtual libraries and online catalogs. Digital technologies offer broad opportunities for creating virtual libraries that provide users with access to various resources anywhere in the world via the Internet. Online catalogs are extremely useful as they simplify the process of searching for and ordering books. Additionally, they provide additional information about available resources, such as reviews, ratings, annotations, and recommendations, which facilitate selection and enhance the user experience. Establishing virtual libraries allows libraries to expand their audience and provide flexible access to knowledge and information. Remote access to resources is important for users who can obtain necessary information even from remote regions or at their convenience. Such a level of digitization promotes the development of a global community of readers and researchers, making information resources more accessible and efficient.

Digital archives. Libraries actively implement digital technologies to create digital archives, which are extremely effective in preserving and accessing rare and valuable documents. This allows libraries to expand their collections and provide greater quantitative and qualitative access to cultural heritage. Additionally, digital technologies play an important role in the processes of conservation and restoration of old manuscripts and books. With specialized programs and scanning, libraries can conduct detailed research and restoration efforts to preserve these documents for future generations. This approach not only saves valuable works from wear and tear and destruction but also ensures their digital accessibility to a wide audience, contributing to the preservation of cultural heritage.

Electronic document exchange. Libraries actively use digital technologies for document and information exchange with other libraries and institutions. This opens up new opportunities for collaboration and knowledge exchange among different libraries in real-time. Thanks to digital platforms and interactive tools, libraries can easily exchange research, resources, and innovative ideas, improving the quality of service and fostering a culture of knowledge exchange in the library field. It also contributes to building a network of mutual support and interaction, expanding access to various resources and information for users.

Utilization of social media and interactive platforms.

Libraries utilize social media and interactive platforms to actively engage readers. Creating virtual communities, discussing books, and announcing events on these platforms not only expand the audience but also enhance interaction between librarians and users. This open interactive space allows communities to share impressions of read works, create recommendations, and participate in joint educational activities. This is an effective way to increase public interest in library services and actively engage readers in cultural and educational initiatives.

■ Challenges and issues of digital library systems

Contemporary digital library systems, while offering numerous opportunities, face a range of significant challenges and issues. One of the main difficulties is the high level of dependency on technological infrastructures and internet connectivity. In case of technical failures or lack of network access, there may be restrictions on access to digital resources.

Another challenge is the issue of data security and confidentiality. The increase in the volume of digital information requires a high level of protection against unauthorized access, cyber-attacks, and loss of user confidentiality. Libraries dealing with a large number of digital resources and users' personal data become targets for hackers and cybercriminals. Ensuring cybersecurity involves the development and implementation of encryption measures, two-factor authentication, as well as continuous monitoring and detection of potential threats. Since libraries store user data, their reading interests, and other personal information, the issue of confidentiality is also extremely important. Implementing an effective privacy policy, including proper access management and use of data anonymity, is necessary to ensure user trust in digital library services. Additionally, the creation and management of digital collections require significant effort and resources, as well as the development of effective strategies for preserving digital archives over the long term. The expansion of digital collections is often associated with a large volume of data, which requires storage and processing capabilities.

Issues also arise in addressing copyright and licensing issues for digital resources. Many digital materials are subject to various legal restrictions, and libraries must carefully study and consider these aspects to avoid legal violations and ensure the legality of the use and distribution of digital resources. M.H. Rahman *et al.* (2023) identify the lack of necessary IT skills among users as one of the main difficulties in implementing digital libraries. It is important to consider various levels of access for different categories of users. The insufficient number of people with IT skills complicates the rapid and full use of digital resources. Additionally, the implementation of digital technologies often requires investment in equipment purchase, software, and staff

training. Problems also exist in the legal aspect, namely with intellectual property rights, which can complicate licensing, exchange, and use of digital content. Based on this, we believe that the implementation of digital libraries is a complex process that requires careful planning and coordination of efforts from various stakeholders. Through a systematic approach and collective efforts, difficulties can be overcome and successful implementation of digital libraries can benefit users and society as a whole.

S.A. Khan & R. Bhatti (2017) conclude that skills in digital technologies for the development and effective management of digital libraries can be divided into three main categories. The first category includes digital competencies necessary for the development of digital libraries. The second category encompasses digital skills related to effective management of electronic libraries. Finally, the third category defines digital competencies important for ensuring the security of digital content. Authors agree that such a division into categories offers several advantages: it helps to clearly define the necessary skills for different positions and tasks; it promotes the development and training of staff in the target direction; and it ensures more effective management of digital libraries.

G.O. Oyovwe-Tinuoye *et al.* (2021) argue that modern technologies demand librarians' continuous readiness and updating of their skills due to rapid changes in the digital environment. Understanding and utilizing ICT enable librarians to function effectively not only within the library but also to actively interact with other fields, thereby expanding their capabilities and enhancing their professional status. Given the dynamic nature of the contemporary environment in which the library operates, it is important to pay due attention to preparing librarians for the use of advanced technologies to optimally perform their duties. Authors support the authors' view that effective librarian training policy implementation requires library management's decisiveness and adequate attention to this issue.

B. Zaka (2022) emphasizes that a significant problem requiring a comprehensive approach to resolution is data analytics, as a large volume of information requires effective processing and analysis methods to derive useful insights. Additionally, system compatibility is another issue since various library components often operate on different technical platforms, requiring integration to optimize workflow processes. Access control to digital resources is yet another significant issue. Ensuring information security and data confidentiality demands reliable authentication and authorization mechanisms. The problems highlighted by the author are indeed pertinent and require a comprehensive approach to their resolution. Specifically, it is necessary to develop and implement effective data analysis methods, ensure system compatibility to optimize workflow processes, as well as ensure information security and control access to digital resources. These measures will help enhance

the efficiency and reliability of data management in the modern information environment.

Author underscores several advantages provided by electronic libraries. The main advantages of this format over traditional libraries include rapid database updates with improved quality control, enhanced search functions, and simplified access to retrieved information, thus increasing user efficiency and reducing bureaucracy. Additionally, there are other potential benefits to consider. Firstly, an electronic library becomes accessible anywhere a personal computer connected to the network is present, providing access both at the workplace and at home. Information resources of electronic libraries are available to users around the clock, providing flexibility in individual knowledge access. In the virtual environment of electronic libraries, convenient access to information resources in various formats necessary for users is provided. This includes video and audio formats unavailable in traditional print publications. Such diverse access allows for more effectively meeting users' diverse knowledge and information needs. According to the authors, electronic libraries also contribute to the dissemination of knowledge and information, reduce costs associated with storing and servicing information resources, and promote environmental sustainability.

I. Yarema (2021) notes that the creation of electronic libraries and online catalogs, as well as document delivery services, have become the most popular applications of internet technologies in the library field. Important directions include remote user registration, ordering and renewing subscriptions remotely, as well as access to electronic forms. Some libraries maintain blogs to inform about cultural, artistic, and educational events. To facilitate information search and communication with remote users, librarians create virtual reference desks, use multimedia services to create virtual tours, galleries, educational video courses, and organize video conferences. Additionally, they implement innovative work forms such as library flash mobs, flashbooks, web quests, virtual exhibitions, book trailers, bibliofreshes, bibliomixes, and so on. Thus, modern libraries can provide a wide range of services using internet technologies. Digital technologies significantly expand library capabilities, providing greater access to information, improving document exchange, and communication between libraries and users. Thanks to digital resources, libraries can provide electronic access to books, journals, documents, and other resources, facilitating more efficient information use.

Moreover, digital technologies enable the creation of interactive platforms for collaborative work, exchanging ideas, and feedback between users and library staff. This contributes to the creation of virtual communities where people can discuss books, share recommendations, and actively interact with each other. With the help of digital tools, libraries can more effectively manage

and archive their collections, as well as provide access to these resources online, making educational and scientific materials more accessible to a wider range of users. Digital technologies also help libraries improve their services, adapting to modern requirements and improving the quality of service.

Conclusions

This study thoroughly analyzed key aspects of the impact of digital technologies on the library and information sphere, considering their importance in the context of the modern information landscape. The analysis of trends and challenges in light of digital innovations revealed not only significant changes in the functioning of libraries but also a substantial transformation of their role, posing questions to the field regarding compliance with modern requirements and the development of strategies.

Studying specific examples of implementing digital technologies in library work allowed the identification of effective practices aimed at improving communication with users and expanding their capabilities. An important aspect is not only technological integration but also the creation of innovative services and resources that meet the changed needs of modern users. This research highlights the urgent need for libraries to adapt to the requirements of the digital age, not only to provide access to knowledge and information but also to actively participate in creating an innovative information environment. The expansion of the role of libraries in the digital society entails not only technological transformations but also the development of strategies that allow libraries to fulfill their mission as key centers of knowledge and cultural heritage in contemporary society.

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The implementation of digital technologies in the library and information sphere brings not only undeniable advantages but also a number of challenges that require attention and competent solutions. One of the important challenges is ensuring the security and preservation of digital archives, as this determines the reliability and integrity of digital information. Considering issues of confidentiality and developing effective strategies for preserving digital resources become priority tasks for libraries to ensure not only the availability of information but also its security. Modern technologies also require constant readiness and updating of librarians' skills due to rapid and constant changes in the digital environment. This means that it is important to provide library staff with proper training to use advanced technologies and consider their readiness to adapt to new tools and approaches.

The further development of the library and information sphere will be determined by prioritizing digital innovations and flexible adaptation to changes in the information environment. Special attention should be paid to the development and implementation of advanced technologies that will contribute to the optimal performance of library tasks and improve the quality and accessibility of provided information services. The lack of sustained readiness for digital transformations may hinder libraries' ability to respond to the challenges of the modern information society and provide necessary user support.

Acknowledgements

None.

Conflict of Interest

None.

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Роль цифрових технологій у вдосконаленні бібліотечно-інформаційної комунікації: тенденції та виклики

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Анотація. Актуальність роботи зумовлена стрімким розвитком цифрових технологій та їхнім значним впливом на всі сфери життя, включаючи бібліотечно-інформаційну сферу. Цифрові ресурси та онлайн-сервіси дедалі більше витісняють традиційні друковані носії, що зумовлює необхідність трансформації бібліотек для збереження їхньої актуальності та конкурентоспроможності. Мета дослідження полягає у вивченні впливу цифрових технологій на бібліотечно-інформаційну сферу, виявленні їхнього потенціалу та ідентифікації викликів, що виникають у процесі цього трансформаційного переходу. У ході дослідження було застосовано різноманітні методи, що дозволило отримати глибоке та всебічне розуміння процесу цифрової трансформації в бібліотечно-інформаційній сфері. Застосування комплексного методологічного підходу, що включав аналіз літератури та залучення різноманітних джерел інформації, дало змогу здійснити всебічне дослідження проблематики. Порівняльний аналіз підходів дозволив зробити об'єктивні висновки та рекомендації щодо оптимального впровадження цифрових інновацій у цій галузі. Результати дослідження вказують на перспективні можливості використання цифрових технологій для оптимізації комунікації та розширення можливостей користувачів. У ході дослідження було визначено ключові аспекти впливу цифрових технологій на бібліотечно-інформаційну сферу. Встановлено їхню важливість у контексті сучасного інформаційного ландшафту. Проаналізовано тенденції та виклики, пов'язані з цифровими інноваціями. Виявлено суттєві зміни у функціонуванні бібліотек та значне перетворення їхньої ролі. Піднято питання про відповідність бібліотек сучасним вимогам та необхідність побудови стратегій розвитку. З'ясовано, що подальший розвиток бібліотечно-інформаційної сфери буде визначатися наданням пріоритету цифровим інноваціям та гнучкою адаптацією до змін в інформаційному середовищі. Отримані висновки та рекомендації несуть практичне значення для сучасних бібліотекарів, привертаючи їхню увагу до важливості адаптації до цифрового середовища. Враховуючи динаміку інформаційного суспільства, акцент на підготовці бібліотекарів до використання передових технологій визначає їхню успішну адаптацію до нових викликів.

Ключові слова: цифрові інструменти; бібліотечно-інформаційна діяльність; комунікація в галузі бібліотечної сфери; роль бібліотекарів у цифровому суспільстві; сучасні трансформації в бібліотеках



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 8, No. 3, 66-75

Article's History: Received: 25.07.2023 Revised: 15.10.2023 Accepted: 08.11.2023

UDC 327(73)

DOI: 10.69587/sdc/3.2023.66

USA Think Tanks: Strategy and informational influence in the globalized media space

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Abstract. US think tanks are key players in the global media space. They are playing an important role in shaping strategies and influencing global public opinion. The aim of the work is to highlight the strategic directions of activity of US think tanks and their trends. The basis of the methodology was the use of a system of general scientific methods and techniques of empirical knowledge: induction and deduction, analysis and synthesis, system and functional approaches, classification and systematization, observation and description, explanation and generalization. In the course of the conducted research, it was determined that the tendency to increase the number of analytical centers in the USA leads to an increase in competition for financial resources, and also leads to a change in the primary specialization: it becomes more and more narrow, leaving only a small number of analytical institutions multidisciplinary. It was also established that the demand for research by analytical centers is growing, so opportunities for cooperation in solving problems are constantly expanding. This is because information requests are becoming more complex and globalized. It was noted that, despite the official statement regarding impartiality and objectivity in matters of political consulting, today there is a noticeable trend of increasing political influence on the activities of think tanks. However, many think tanks, in addition to addressing socio-economic issues, have a relentless desire to engage in policy advocacy, which can lead to certain negative trends: the focus of their activities can change from professional analytics to the conductor of existing party policies. The practical value of the work lies in its use during the educational process by students of higher education who gain knowledge in the specialties of "Information Analytics", "Political Science", "International Relations", etc., as well as those who are interested in the place of the United States in the globalized world and its influence

Keywords: social and political influence; think tank; analytical center; United States of America; policy advocacy

Suggested Citation:

Klynina, T., & Isaikina, O. (2023). USA Think Tanks: Strategy and informational influence in the globalized media space. *Society. Document. Communication*, 8(3), 66-75. doi: 10.69587/sdc/3.2023.66.



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Introduction

"Analytical institutes", "think tanks", "brain centers", and so on, constitute the main, but far from exhaustive list of what is encompassed in the understanding of the term "think tank". According to the Encyclopedia Britannica, a "think tank" is defined as an "institution, group, or corporation organized for interdisciplinary research with the objective of providing advice on various political issues and products by using specialized knowledge and networking" (Ladi, n.d.). The key point in this context is the understanding that analytical centers, for the purpose of "advice", direct their activities towards improving government policy rather than formulating it. This position is also demonstrated by the research of J. McGann (2017), which indicates that analytical centers in the USA play a crucial role in society and have significant influence on the process of formulating political recommendations on domestic and international issues. During the first decades of the 20th century, analytical centers were established with the aim of improving the decision-making process of governments. This led to the widespread perception of them as objective and politically neutral institutions specializing in the study and analysis of current political issues. The emergence of the information society necessitated the development of expert and effective solutions in the process of governance, which, in part, was achieved through the growth of research organizations capable of providing such solutions. Gradually, not only quantitative breakthroughs occurred, but also qualitative ones: the scale and impact of the activities of analytical centers at the regional, national, and global levels grew exponentially.

In the 2022–2023 a different trend is observed: attention is paid to marketing ideas, the struggle for information influence, strengthening of reputation indicators through advocacy of certain government officials, presidential candidates, congressmen, etc., as well as a shift in the landscape of the state's social fabric. The current influence of American "Think Tanks" is not limited to the political sphere alone, but extends to social, cultural, military, and other spheres. This is due to the fact that analytical centers are becoming increasingly prominent worldwide, and their functionality goes beyond the initial ideas. In such conditions, US analytical centers play a key role, serving as a reference point for others. Observing the analyses conducted by American analytical centers is important for understanding the reactions and actions of the USA to global events. The information obtained from these analytical centers, essentially, can assist other countries in adapting to US strategies and actions, which can have a significant impact not only on international relations, but also on the development of domestic political processes in individual states. Contemporary researchers argue that the USA has a vast and influential community of analytical centers and, thus, influence global discourses on important international political issues in various ways; they assess analytical

communities as components of the United States' global power, involved in the task of adjusting political reality through the entire cycle of analytical production: from problem analysis to decision implementation in the management system (Matviychuk & Khilko, 2023).

The existence of Think Tanks in various internal and external contexts and forms always prompts reflections on their nature, independence, and reliability. Many scholars point out the uniqueness of the role of analytical centers (Planells-Artigot *et al.*, 2021). They argue that despite a number of controversial issues regarding the essence of analytical centers as a socio-political phenomenon, brain centers perform a range of functions that make them unique in many ways. This uniqueness is ensured by the speed of response, action, and the thoroughness of conclusions supported by evidence-based data. The uniqueness of US brain centers is also defined by their multifunctional orientation: ranging from educational functions, informational-educational work, to intermediation between the academic community and politicians, serving as a platform for discussing urgent socio-political issues. Therefore, the purpose of the article is to analyze the plurality of conclusions regarding the nature and essence of US brain centers, as well as their strategic and informational role in the modern media space.

Literature Review

The academic community, since the emergence of analytical centers as institutions, continues to explore the role of these institutions in the life of the state and society. In the conditions of globalization and the formation of a multipolar world, discussions about the influence and significance of analytical centers only gain new dimensions and trends. Researcher W. Wallace (1994) argued that analytical centers are the generators of innovative ideas. Scholar J. McGann (2020) dedicated his research to defining the role of analytical centers specifically in foreign policy. According to their opinion, by being involved in the process of formulating the country's foreign policy course, analytical centers thereby determine the political agenda of the United States of America. In agreement with this point of view, it is worth adding that by defining the priorities of certain state management issues, analytical centers may promote their own interests or serve as lobbyists, advocating the interests of a particular individual, party, company (group of companies), or public figures (the latter being predominantly an exception rather than the rule). Thus, analytical centers are not entirely neutral and may perform different functions at different stages of their activities, as well as act as intermediaries between political governance and its consumers. "Think Tanks" gain significant popularity, especially during national and international crises, such as the full-scale Russian invasion of Ukraine (February, 2022) and the military actions of the Gaza Strip against Israel (October, 2023). Researcher

D. Abelson (2018), who studies the phenomenon of the growth of analytical centers, the activation of which falls on the second half of the 20th century and continues to the present day, asserts that analytical centers in the United States are an integral part of the political landscape, and no other country in the world has a similar experience to that of the United States, making this country somewhat unique and a model for others. In his opinion, it is the quality expertise conducted by analytical centers and their close connection with the political establishment that are the instruments (D. Abelson refers to them in his work as "attributes") that make analytical centers unique and distinguish them among other actors of socio-political changes. Balancing between the theory of elites and pluralistic theory, the researcher tries to find the key to understanding the influence of analytical centers and ultimately concludes that analytical centers have different priorities at different stages of the political cycle. According to researchers A. Salas-Porras & G. Murray (2017), analytical centers, which perform a socio-activist function, can not only contribute but also simultaneously hinder important social changes (although such action is not always deliberate). The authors emphasize the social activity of analytical centers, the purpose of which is to penetrate or join civil society and social movements. Therefore, among the most important strategies that analytical centers adhere to today, according to the author, is social activity aimed at effecting social change. Researchers focus on how analytical centers penetrate power structures, thereby controlling global resources. Thus, analytical centers are not only a tool for initiating certain political ideas and changes but can also be a mechanism, that is, used by elites or a particular interest group to create certain challenges for the authorities. However, the author also notes the "liminality" of the position held by analytical centers in the power structure system. This position means that analytical centers are supposed to be at the "border" between two parts, two entities (in this case, elites and authorities), but at the same time not being a part of either the first or the second part/entities. The researcher used this "liminality" to define analytical centers as independent and neutral organizations. Problem-oriented research by J. Pan (2021) is dedicated to analyzing the general laws and internal logic of the work of think tanks, revealing the methodology for studying the problem (from a systematic to a dialectical perspective). This mentioned scientific work focuses on characterizing the research questions in think tanks and reveals the general guiding rules and inherent logic of research in analytical centers. The author's work is more practical in nature, unlike other scientific work presented above, as his work directly provides appropriate methods to improve the validity and reliability of research results. Among the cohort of Ukrainian researchers, there are also scholars who work on analyzing the phenomenon of analytical centers both in Ukraine and beyond its borders (Petrenko, 2018;

Senchenko, 2021a; 2021b). Mostly, their focus is on the historical conditions and socio-political basis for the formation of analytical centers, the representation of Ukraine in the activities of think tanks in the United States, and the problem of the influence of analytical centers on shaping the foreign policy of this country. The understanding of the phenomenon of think tanks in the United States and the algorithm of their activities and influence are also in the scientific focus of Ukrainian researchers.

Materials and Methods

In conducting the research, a systematic set of general scientific methods was employed (including induction and deduction, analysis and synthesis, systemic and functional approaches, classification and systematization, observation and description, explanation and generalization). The methodological basis of the study was the application of analysis and synthesis, which allowed identifying trends and cause-and-effect relationships in the activities of analytical centers in the USA. The conceptual basis of the article is based on establishing the correlation between the activities of analytical centers and the social changes they may bring about. The article relies on the analysis of primary sources, represented by annual reports for the years 2015-2020 – "Global Go To Think Tank Index Report", provided by the Program on Think Tanks and Civil Societies of the University of Pennsylvania in the USA (Global Go To Think Tank Index Report, 2015; 2017; 2020). Such a chronological selection contributes to understanding the trends of analytical centers as a socio-political phenomenon. The application of the chronological method in this case led to the identification of development patterns of analytical centers in the USA. To study changes in the quantitative indicators of analytical centers in the USA over the period of their existence, the method of typological analysis was also applied. Normative legal documents of the Internal Revenue Service of the USA, which is a subdivision of the US Department of the Treasury (Internal Revenue Code), served as an important source for the study. The use of such documents allowed understanding how the financial and tax system of the USA affects the essence of the activities of analytical centers, determining their main motives and direction. Materials from the official websites of the largest analytical centers were used as sources for analyzing their activities and tracking changes regarding their previous roles, as well as studying the representational component of analytical centers in the socio-political life of the country. Analytical centers were selected using purposive sampling according to international recognition from the Global Go To Think Tank Report. The observation method was applied to collect data on changes in the primary function of analytical centers from their inception to the present, which allowed identifying transformations in their activities and future strategies. Literature necessary for writing the article and searching for relevant sources was selected

using the bibliographic method. The application of analytical-synthetic and comparative methods resulted in identifying trends in the realm of the defined problem; the content analysis method was used to identify internal trends and development opportunities of the analytical center as the object of study; inductive and deductive methods were employed for generalization and systematization of conclusions.

Results and Discussion

"Analytical centers" as an institution originated in the first decades of the 20th century in the United States of America (the first institution dates back to 1910). During World War II, the term "analytical center" was used to denote a secured room where representatives of defense and military planning could meet to discuss strategic issues.

The term "analytical center" or "think tank" gained widespread usage since the 1970th, when there arose a need for various types of political research in the United States (Medvetz, 2012; Plehwe, 2015). Prior to this period, most of these organizations were primarily considered institutes or centers for scientific research that contributed to the refinement (upon request and necessity) of the policy-making process (Salas-Porras & Giordano, 2022). Overall, during the period from 1945 to 1991, the definition of the term "analytical center" was mainly based on the analysis of US analytical centers and aimed to emphasize their nonpartisan, apolitical, and nongovernmental character. In the subsequent decades, there was a quantitative increase and territorial expansion of such institutions worldwide. However, one trend remained unchanged - American analytical centers constituted the vast majority of the total number. In percentage terms, on the territory of the USA, there were 20-25% (i.e., 1/5) of the total number of analytical centers in various years (Keudel & Carbou, 2021).

This trend persisted in subsequent years. According to the report on the global index of analytical centers for the year 2015, there were 6618 organizations worldwide, of which 1835 were in the USA. In 2017, the indicator of the total number of analytical centers in the world increased to over 7815 institutions, with 1872 in the USA. The year 2020 brought new impressive data: around 11,000 analytical centers worldwide, of which 2203 institutions are located in the USA. Such an increase in analytical centers worldwide and in the USA, in particular, allows us to conclude about the growing importance, status, and influence, especially in the realm of politics (Global Go To Think Tank Index Report, 2015; 2017; 2020).

Researcher D. Korotkov (2023) notes that the interpretation of the concept of "analytical center" is not static and raises certain questions. Institutions actively engaged in informational-analytical and political research strive to reach a consensus on what an analytical center is and what its main goals are. D. Abelson (2018) suggests applying the term "analytical center" only to large, financially capable organizations that engage in the study of

political, social, and economic issues. Investigating the appropriateness of using one definition or another for the concept of an analytical center is not the purpose of this article. However, it is relevant to emphasize that within the scope of this study, an "analytical center" is understood as an institution organized for interdisciplinary research aimed at providing advice on various political, social, and economic issues and products.

The definition of the essence of the concept of "analytical center" and the scope of its application are somewhat influenced by the existing tax system in the United States. Most analytical centers have the status of nonprofit organizations. Accordingly, nonprofit organizations are granted significant benefits, but also face many restrictions on political activity (Rudder & Main, 2023). Besides being nonprofit, these organizations must also be charitable, religious, educational, seek to prevent cruelty to animals or children, or provide similar public goods. These organizations are exempt from federal taxes, and, more importantly, contributions to them are not taxed for donors, whose names they are not required to disclose. However, nonprofit organizations are prohibited from engaging in "political campaign intervention". According to the Internal Revenue Code, this means, among other restrictions, that they cannot contribute funds to specific candidates or parties, nor can they directly lobby for certain election outcomes. Consequently, an "analytical center" cannot be an organization that simultaneously provides advice on various political, social, and economic issues and products; these spheres of activity must be delineated (Lalueza & Girona, 2016).

Most traditional analytical centers historically have distanced themselves from electoral and even legislative politics more than required by the limitations imposed by their tax classification. However, some analytical centers seek to directly influence the political process in the USA and advocate for a particular ideological or party viewpoint. Such organizations include the Heritage Foundation and the Center for American Progress. To be able to directly participate in electoral politics and advocate for certain legislative outcomes, organizations change their statutes and are classified as "social welfare organizations or public organizations", which are allowed, among other things, to contribute to political candidates provided their "primary purpose" is social welfare or public good (Social Welfare Organizations, n.d.). However, in this case, questions arise about understanding the concept of "public good" in the political sphere and what criteria should be applied to determine whether an analytical center is a social welfare organization. In this context, concerns about the masking of lobbying efforts by a particular corporation or individual under the guise of social welfare organization activity may also be raised.

As of today, the United States of America has a network of analytical centers exceeding 2,000 names (Global Go To Think Tank Index Report, 2020). It is unlikely that

any researcher could list them all, but each of them can highlight 5-7 institutions that are popular not only within the USA but also far beyond its borders. Among the most prominent ones are the Brookings Institution, the Carnegie Endowment for International Peace, the RAND Corporation, the American Enterprise Institute, the Heritage Foundation, the Hoover Institution, and others. These institutions occupy top positions in the Global Go To Think Tank Index Report. Today, all these analytical centers do not focus on narrow areas or individual issues but, on the contrary, seek to address a wide range of socio-political issues: from economics to foreign policy. Due to this diversification, we can observe a fairly wide range of functions performed by analytical centers: from assisting in the analysis of current situations in all spheres of life to mediating between the government and the public, helping to build trust in public officials (McGann & Shull, 2018).

The following brain centers are distinguished by dominant target areas of activity:

- ✓ Research-publishing;
- ✓ Lobbying;
- ✓ Legal defense;
- ✓ Cultural;
- ✓ Targeted (Godlyuk, 2011).

Almost all of them implement original research and educational programs aimed at educating and influencing policymakers and opinion leaders on a wide range of economic, social, political, environmental issues, and security problems. Additionally, they serve as a special tool for social control and thus participate in defining and representing certain goals and values of society. American analytical centers play an important role in disseminating information among policymakers, shaping the contours of public discourse, and functioning of the US government. They also become a constructive forum for information exchange among key stakeholders or a "neutral space" for conducting debates. Specifically, several American analytical centers, including the American Enterprise Institute, Hoover Institution, Heritage Foundation, and Brookings Institution, have actively participated in several presidential campaigns and the transitional periods that followed. Employees from these institutions provided advice to Donald Trump, Barack Obama, George Bush, and other presidential candidates during primaries they participated in and jointly made efforts to convey political recommendations to them and those in their administrations (Bohdanova, 2018).

In this context, the activity of the analytical center "The Niskanen Center" is illustrative, which defines its political position as "moderation" while emphasizing support for the principles of liberal democracy. In 2023, Time magazine outlined this analytical center as the "most interesting analytical center in American politics". As the author of the article, M. Ball (2023), notes, "The Niskanen Center with its roots in the libertarian right, is both the vanguard and the engine of this lowered

tendency. Working outside the party bunkers where most District of Columbia supporters gather, or between them, it gained a reputation on Capitol Hill for its unorthodox political ideas that can bridge the gap between left and right". "The Niskanen Center" does not hide its intentions regarding its activities and on its official website openly states that it "advances policy... shapes a new vision of American governance... engages government leaders, advocacy, and media as dominant factors in policy outcomes" (Niskanen Center, n.d.).

The analytical center's advocacy is supported by "working with a wide range of participants", whom they invite to cooperate on their own terms (specific conditions are not provided), and whom the center helps to unite in politics. Analyzing the activities and reports of the center for previous years, we see that among the "wide range of participants", special attention is paid to Senate committees, senators themselves, and congressmen. For example, in May 2023, the Senate Budget Committee invited the president of the analytical center, Ted Gayer, to express his opinion on the issue of fossil fuels (and subsidies for them) (Koval *et al.*, 2022). However, among the entire list of "wide range of participants", the name of Senator John Hickenlooper (Colorado) stands out. There is no direct reference to contact with the senator on the analytical center's official sources, but through the application of content analysis and statistical calculations, a "high" interest of the center in the activities of Senator John Hickenlooper was identified. Moreover, his name is not always mentioned in the context of Senate hearings but has other "political" connotations (for example, his name appears on the analytical center's website starting from 2017 and is mentioned in various political contexts, such as Trump's policies, the 2020 US elections, alternative to Joe Biden in the 2020 elections, etc.). Also notable is the linguistic form of expressions used by the center to present material mentioning Senator John Hickenlooper ("proud to endorse", "applauds"). Interestingly, the senator is the author/co-author of bills in the fields of emissions, workforce shortages, electricity, immigration, i.e., exactly those areas that "The Niskanen Center" promotes and supports. Furthermore, the senator is a member of the US Senate Committees on: Energy and Natural Resources; Health, Education, Labor and Pensions; Commerce, Science, and Transportation; Small Business and Entrepreneurship. Of course, it can be assumed that as a former geologist, the senator shares the values upheld by "The Niskanen Center". However, in this case, there is a significant influence of the institution on political and social events within the United States through "expertise and consultation" with Senator John Hickenlooper. Moreover, "The Niskanen Center" directly indicates that it is an "advocacy organization, founded to change state policy by directly participating in the policy development process" (Niskanen Center, n.d.).

It is worth noting that the tendency of "political influence" by analytical centers was not observed from

the very beginning of their establishment. For example, the Brookings Institution sought to adhere to the stated separation from the political process. An example of such distancing can be seen in the analysis and recommendations of the Brookings Institution regarding the Great Depression of the 1930s (Brookings's analysis..., 2016). The American Enterprise Institute, with a clear focus on promoting the interests of free enterprise, also distanced itself from government functioning. The situation changed after World War II, when new international realities required rapid response. The radical change in the country's foreign policy from isolationism to global leadership required the generation of new ideas, which analytical centers provided to the American government, becoming advocates of policy in a way. This trend continues to this day.

A new strategic point on the agenda of analytical centers in the 21st century has become the desire to influence public opinion to raise awareness of the public about socio-political issues. In this way, brain centers act as agents of social change (Providing solutions..., 2023). They effect social change in several ways: by developing economic and social policies, proposing powerful ideas to influence policymakers and public opinion, and prompting paradigm shifts through a combination of strategies. Additionally, they develop an ambitious research program and engage in social activism to penetrate or join civil society and social movements. The struggle to promote social change involves not only a diverse combination of strategies but also articulating networks and coalitions that cross countries and regions, connecting analytical centers with academic institutions, non-governmental organizations, and other civil society actors (Salas & Giordano, 2022).

The information-analytical products of brain centers also serve as a means of influencing public opinion and policy in general. Political reports, analytical notes on specific issues, books, analytical recommendations, expert reviews, and academic journals are traditional working products of American think tanks that can be used as templates for policy initiatives and recommendations for the US government and president. Some analytical centers seek to go beyond "traditional" methods of informing the public by leveraging the advantages of the digitalization process. Many analytical products (lectures, discussions, interviews) in the form of podcast recordings are created to be useful for policymakers and international politics in universities and high schools. The goal of such media strategies is to inform the public about the organization's views on current events and to highlight publications or key issues. Many analytical centers strive to develop niche programs, such as datasets, to fill gaps in existing academic research or government databases.

Despite the significant intellectual potential of scholars at American universities, experts from analytical centers are recognized as more qualified. It is emphasized that analytical centers provide information that is more

attractive to government officials. Analytical centers specialize in creating research products that meet the needs and preferences of government policymakers and legislators, focusing on the institutional issues of their target audience. As a result, most organizations take pride in being "idea factories" for the government. Essentially, US analytical centers serve as sources of government expertise (providing recommendations), as sources of future personnel (appointing analytical center workers to managerial or advisory positions) (Senchenko, 2021a), as alternatives to university research (bridging the gap between academic science and government/society). US brain centers often become involved in the partisan dynamics prevailing in Washington. Some openly take a partisan or ideological position (Korotkov, 2023), while others, seeking to gain public trust, strive to remain independent and objective. In analytical centers, especially large ones, there is a wide variety of expert opinions. Among the most influential analytical centers, there is often a tendency to support close bipartisan ties.

The issue of the "influence" of analytical centers is dominant in the scientific literature directly dedicated to their activities. The rapid development of the "analytical center" as a phenomenon of socio-political phenomenon and its "information output" beyond the state in which it (i.e., the analytical center) operates raises questions about the influence of this institution. However, the complexity of answering this question lies precisely in the difficulty of interpreting the category of influence. This problem needs to be investigated directly through questions about how significant this influence is and whether it is democratically legitimate, whether it can be decisive at certain moments of the political process, and whether it can be measured. The consequences of the activities of analytical centers are difficult to assess (Misztal, 2012; Hernando *et al.*, 2018). Because brain centers may seek various types of influence (influencing public or elitist opinion, creating new policies, influencing the implementation of existing policies, providing the government with new officials); success (influence) can be assessed differently, depending on the specific criterion or standard by which the assessment is made. It is worth noting that at the beginning of the 21st century, scholars L. Jacobs & B. Page (2005) raised questions about whether actors really influence the decisions made by government officials on domestic and foreign policy issues and emphasized divergent views on this issue. They directly pointed out actors such as: groups of people organized around common interests; epistemological communities, as well as ordinary citizens. Considering the understanding of the epistemic community from the perspective of P. Haas's (1992) concept as "a network of professionals with recognized experience and competence in a particular field and authoritative claims to knowledge related to policy in this field or problem area", it is necessary to attribute analytical centers precisely to this community. Thus, from today's

perspective, the question of whether analytical centers influence the formation of ideas on socio-political issues in public administration should be answered positively. D. Abelson (2018) holds a similar view, pointing out the controversial and uncertain role (understood as influence) of analytical centers, but acknowledging them as actors of this influence.

The political establishment, public opinion, and practicing scholar-analysts generally agree that American think tanks have achieved particular success in influencing policy. The complexity of assessing the "impact effect" of analytical centers on the socio-political life of the United States and its citizens also lies in the different understandings of what influence is, as well as the imperfect methodological basis for assessing such influence. For example, scholar A. Longhini (2015) suggests considering the influence of analytical centers through a causal-political context. In her opinion, such influence is not a constant substance but can vary depending on the context. We agree with this approach because depending on the context (in this case, the political situation, foreign policy priorities, and existing social problems requiring solutions at the moment), the same object, event, or situation can have different meanings or interpretations. For example, an analytical center focusing on climate issues may have minimal influence on officials who are currently, for example, focused on counterterrorism efforts. Conversely, when climate change issues again become prominent, the influence of such an analytical center will be more significant. It is possible to hypothesize that the influence of an analytical center also directly depends on external political circumstances and the rules of the game on the international stage.

Renowned American researcher J.W. Kingdon & J.A. Thurber (2011), focusing on understanding the agenda-setting in US politics, noting the aspect of "unpredictability", argued that analytical centers cannot directly influence the final choice of American politicians. However, in their view, brain centers have wide opportunities to regulate the boundaries of respectable debates, which will have a good result – considering various alternatives. This should also be agreed upon because qualitative, structured, and comprehensive coverage of the problem can help shift the official's focus, allowing them to move beyond established beliefs and practices. The question of the possibility of measuring the informational influence of brain centers by quantitative mentions and citations in the media, the number of subscribers and likes on the official accounts of analytical centers on social networks, and the number of appearances in various committees of the US government is one of the most discussed options for assessing influence. J. McGann (2020) suggests understanding the influence of analytical centers by involving "usage indicators that measure the degree of media and government officials' references to analytical centers for information". Thus, the more various media refer to the conclusions of a

particular analytical center, the more likely and higher its influence. However, researchers A. Rich & R. Weaver (2000) argue that those analytical centers that are more ideologically conservative are cited much more often in the media than noticeably liberal ones, and the difference in budget resources of analytical centers is also the "cause of visibility in the media". The authors of the article suggest that mentioning certain information in the media with reference to an analytical center may only be the result of presenting an idea that is being discussed in society, rather than its public acceptance and recognition as a component of influence. Moreover, the pursuit of media mentions to achieve a certain influence indicator may have a reverse effect, and analytical centers will direct their research not to socially important topics but to those that attract more attention. In this case, the issue of symbiosis should also be considered: the media use analytical centers to inform about their activities or highlight their contribution in the form of articles, while analytical centers themselves use the media to spread their ideas. These relationships are often accompanied by problems, as some analytical centers have privileged access to the mass media, while others almost never have such opportunities.

Thus, emphasizing the difficulty of measuring the influence of an analytical center on the socio-political life of the state, it is recommended to take into account the system of criteria proposed by the authors of the article for the possible measurement of influence: the presence of the brain center in the Global Go To Think Tanks Index Report list; the correlation of this position over the last 3-5 years; the number of active (well-known) scholars in it and their percentage of the total number of analytical center employees; the number of publications and scientific achievements; the number of subscribers on social networks, visitors to their websites, and indicators of follower growth (decrease); ease of mention among the general population; diversity of the target audience targeted by their activities; quantitative and percentage ratio of the analytical center's offer to demand from politicians; the number of invitations to representatives of analytical centers for hearings in Congress, etc. This list is not exhaustive, but it can serve as a guideline for understanding the criteria for measuring influence indicators.

Conclusions

The increasing number of analytical centers worldwide is evidence that analytical centers and their products are in demand. The uniqueness of US analytical centers lies not so much in their quantitative superiority as in their qualitative dominance, which manifests itself in the degree of their active participation at various stages of political governance. In turn, the possibility of active participation is explained by the large number of available channels for influence. The fact of such "intervention" is not always due to financial capability and the presence of certain "hidden mechanisms". It is worth considering

the fragmentation and decentralization of the US political system, the weakness of the civil service, as well as the target audience for which this influence is intended. At the same time, US analytical centers have more opportunities, connections, and channels to significantly influence the process of state governance and the adoption/implementation of a particular political course. Of course, this mainly concerns the largest ones, such as the Brookings Institution, the Carnegie Endowment, the Heritage Foundation, and so on.

The question of the "influence" of analytical centers is one of the most problematic and is measured by the following approaches: 1) analytical centers are passive political players who engage in "assuring" elites of the fairness of their views; 2) analytical centers are influential mainly in crisis moments. Another problem faced by American think tanks is adhering to the boundary, from which it is very easy to transition from the field of political research to the realm of political propaganda. Another aspect of the existence and functioning of US analytical centers is their authority, popularity, and their ability/inability to establish a presence in the policymaking community.

The vast majority of analytical centers at the turn of the 20th and 21st centuries changed their status from non-ideological political advisors to policy advocacy, expanding the scope of their influence. Of course, they

are also active, to one degree or another, in the fields of economics, trade, social issues, taxation, budgeting, and other issues. In order to have the opportunity to be involved in influencing the aforementioned spheres of societal life, analytical centers define comprehensive public relations as one of the strategies of their activities for disseminating their work; another important point is the further development of communication strategy, as well as obtaining necessary stakeholders.

The historically formed predominance of research by analytical centers from the perspective of political science and public administration poses before the authors of the article the outlines of future research directions for academic analysis of the influence of think tanks on the healthcare planning system and climate change.

■ Acknowledgements

This research was made possible by a grant provided by the University of Texas at Austin (USA). Personal gratitude is expressed to Mary Neuburger, Chair of the Department of Slavic and Eurasian Studies at the University of Texas at Austin, and the administration of the Clements Center for National Security at the University of Texas at Austin.

■ Conflict of Interest

None.

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Аналітичні центри США: стратегія та інформаційний вплив в глобалізованому медіапросторі

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Анотація. Аналітичні центри США є ключовими гравцями у глобальному медіапросторі, та відіграють вагомую роль у формуванні стратегій та впливу на глобальну громадську думку. Мета роботи полягає у висвітленні стратегічних напрямлень діяльності аналітичних центрів США та їх тенденцій. Основою методології дослідження стало використання системи загальнонаукових методів та прийомів емпіричного пізнання: індукції й дедукції, аналізу та синтезу, системного та функціонального підходів, класифікації та систематизації, спостереження та опису, пояснення та узагальнення. У ході проведеного дослідження було визначено, що тенденція до кількісного збільшення аналітичних центрів США призводить до зростання конкуренції за фінансові ресурси, а також веде до зміни першочергової спеціалізації: вона дедалі стає більш вузькою, залишаючи багатопрофільними лише невелику кількість аналітичних інституцій. Також було встановлено, що попит на дослідження аналітичних центрів зростає, тому можливості для співпраці у розв'язанні проблем постійно розширюються. Це пояснюється тим, що інформаційні запити стають все більш складними та глобалізованими. Було зазначено, що не дивлячись на офіційне ствердження щодо неупередженості та дотримання об'єктивності в питаннях політичного консультування, на сьогоднішній день помітною є тенденція щодо посилення політичних впливів на діяльність аналітичних центрів. Однак є очевидним, що багато аналітичних центрів окрім вирішення суспільно-економічних питань, мають невпинне бажання займатися адвокацією політики, що може призвести до певних негативних тенденцій: фокус їхньої діяльності може змінити вектор від професійної аналітики до провідника існуючих партійних політик. Практична цінність роботи полягає у її використанні під час навчального процесу здобувачами вищої освіти, які отримують знання за спеціальностями «Інформаційна аналітика», «Політологія», «Міжнародні відносини» тощо, а дослідниками ролі США та їх впливом у глобалізованому світі

Ключові слова: суспільно-політичний вплив; think tank; «мозковий центр»; Сполучені Штати Америки; адвокація політики



Academic schools and social movements of Lviv University at the beginning of the XX century: The historical discoveries

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Abstract. The relevance of the research topic lies in the importance of understanding the historical context in which scientific schools and social movements of the Lviv University were formed at the beginning of the 20th century, which will contribute to a better understanding of contemporary scientific and socio-cultural processes and will also facilitate the discovery of new perspectives in the study of the history of the university environment and its impact on society. The aim of the study is to systematize and analyze historical events and processes related to the development of education and science in Lviv at the beginning of the XX century in order to understand their impact on the modern socio-cultural environment. During the work, methods of archival research were used to analyze documents containing information about the university's activities, and historiographic analysis to review and study scientific works and sources related to its role in the socio-cultural context. As a result of the study, the role of the Lviv National University at the beginning of the XX century in the modernization of the educational and scientific sphere of Galicia was established through archival research of archival documents containing information about the university's activities, its founders, administration, educational process, student life, as well as through historiographic analysis of scientific works and sources related to its role in the socio-cultural context; the influence of the university environment on the socio-political life of the region and student initiatives was analyzed; the ideas of creating a separate Ukrainian university as an important step in national self-identification and the development of education in Galicia were generalized. The results of the study can be used to create historical narratives, document the development of education and science in the region, as well as to preserve and study cultural heritage

Keywords: natural sciences; social sciences; university environment; academic sphere; Galicia; socio-cultural context; Ukrainian university in Lviv

Introduction

In the 21st century, during a period of rapid globalisation and constant societal changes, the role of universities as centres of education, science, and culture becomes particularly significant. The modern world demands from educational institutions not only to provide high-quality education but also to actively participate in addressing complex societal issues and developing the intellectual

potential of society. In this aspect, the study of the history and development of Lviv University at the beginning of the 20th century becomes especially relevant, considering its contribution to the development of scientific schools, cultural movements, and the formation of national identity. The research aims to reveal the key aspects and significance of the university environment on

Suggested Citation:

Sukhyy, O. (2023). Academic schools and social movements of Lviv University at the beginning of the XX century: The historical discoveries. *Society. Document. Communication*, 8(3), 76–85. doi: 10.69587/sdc/3.2023.76.



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the threshold of societal and educational modernisation. By examining the historical context and the influence of university initiatives on public life, this article aims to elucidate the importance of the past for contemporary developments in education and science.

Researchers' attention has always been drawn to Lviv University, and recent studies represent new steps towards understanding its history, to some extent complementing and expanding previous works. V. Kachmar (2021), while investigating Lviv University at the turn of the 19th and 20th centuries, emphasises that the modern Lviv University, although dedicated to European values, still retains a Ukrainian spirit. No other university in Ukraine has passed through so many centuries, not only adopting universal scientific approaches and achievements but also contributing to the national idea. No other university has had such an impact on the formation of an independent and democratic Ukraine as Lviv University.

M. Hnatiuk (2020) explored theoretical and methodological searches in literary studies by Lviv University scholars from the establishment of the Russian Literature Department in 1848. The theoretical and literary studies by Lviv philologists contributed to the understanding of European theoretical achievements not only in Galicia but throughout Ukraine. The analysis of higher education in Eastern Galicia at the end of the 19th and beginning of the 20th centuries by Z. Nahachevska (2021) indicates that the contemporary Ukrainian youth and representatives of the socio-political elite showed significant interest in higher education and actively worked at the regional and state levels to address issues in this sphere, highlighting the importance and relevance of educational matters in Ukrainian society at that time. O. Sukhyy's study (2013) reveals key political and socio-cultural dynamics at Lviv University at the turn of the 19th and 20th centuries. The author emphasises that the struggle for a national school, particularly for a Ukrainian university in Lviv, not only reflected the national-political situation in Galicia but also determined further prospects for the Ukrainian national movement. Additionally, the research underscores Lviv's importance as a centre that accumulated and defined socio-political processes in the region, particularly in the fields of education and culture, which influenced the political climate in the city.

An invaluable scholarly work is L. Zashkilnyak's study (2015), which systematises and analyses the long history of Lviv University, considering it in the context of three significant stages of socio-political, cultural development, and the evolution of historical thought and historiography. These stages reflect important trends and preferences in thought that emerged in Central and Eastern Europe during that period, including the influence of Enlightenment, Romanticism, and Positivism on society and science. Such analysis allows for a better understanding of the university's role in shaping and developing historical consciousness and knowledge about

Ukraine during this period. The history of ethnographic disciplines at Lviv University over a significant period from the late 18th to the first half of the 20th century was conducted by R. Tarnavsky (2017). Special attention was paid to the scientific achievements and lives of prominent scholars who played a key role in the development of ethnology, anthropology, and folklore studies at the university. The research holds significant importance for further understanding the development of academic disciplines at Lviv University and their impact on Ukrainian and global science.

Such studies are crucial for understanding the history and development of Lviv University, as well as its influence on Ukrainian society and science. They help identify key moments and trends in the evolution of the educational institution, including its contribution to the national movement, scientific research, and cultural development. The authors focus on the university's role in shaping historical consciousness, educational standards, and ideologies that defined the development of Ukraine and Central Europe during the 19th and 20th centuries. Such research creates a basis for further studies and contributes to a deeper understanding of the historical, cultural, and scientific aspects of university activities. The research aims to reveal the historical context and investigate the scientific schools and social movements that emerged at Lviv University at the beginning of the 20th century through the analysis of archival materials. The choice of research methodology involved determining a system of methods and approaches used for data collection, analysis, and interpretation within the framework of the specific study. The selected methodology determines the quality and reliability of the results obtained, so it is chosen considering previous research, historiographical analysis, and existing approaches to data analysis. The use of a comprehensive methodological approach, which included the analysis of scientific sources and the involvement of various information resources, allowed for a detailed examination of the problem, stimulating the expansion of understanding and the identification of new aspects of the topic.

■ Lviv University at the beginning of the XX century: Political, social, and academic transformations

At the beginning of the 20th century, Lviv and Lviv University continued to experience intense political and social changes, marked by a vigorous strengthening of national aspirations among all ethnic groups, particularly among the Polish and Ukrainian communities in Galicia. Being the capital of Galicia, Lviv not only concentrated social and political processes and their changes but also often defined their general character for the entire country. The city's political landscape was predominantly shaped by unresolved national and social conflicts. The duties of the capital, namely the integration of various interests and preferences of its residents, intensified

political diversity and transformed Lviv into a place of contrasts, constant tension, and emotional outbursts.

According to the research by V. Kachmar (2021), at the beginning of the 20th century, the number of faculty members at Lviv University continued to grow, reaching 169 individuals in the academic year 1913/1914, including 83 professors, four honorary professors, 66 private lecturers, and 16 assistants and lecturers. The largest number of teachers was concentrated at the philosophical faculty. Additionally, there were about 70 assistants working at the university. Therefore, it can be concluded that at the beginning of the 20th century, Lviv University grew both in terms of the number of faculty members and the variety of specialists. The philosophical faculty had the largest number of teachers, and there was also a significant number of assistants, indicating the university's broad academic potential during that period. During this period, the university actively expanded its material and technical base. In 1905, a new building of the university scientific library, now located at 5 Dragomanov Street, was put into operation, becoming a significant scientific centre.

The educational process also underwent changes. The philosophical faculty became an independent educational unit with the possibility of preparing graduates for teaching in secondary schools. The development of philosophy at the university was closely related to the activities of Professor Kazimierz Twardowski, whose lecture in 1895 is associated with the beginning of the Lviv-Warsaw philosophical school (Barwinski, 1912). The Polish Philosophical Society, founded on February 12, 1904, the anniversary of Immanuel Kant's death, became the basis for the organisational structure of the Lviv-Warsaw philosophical school. This step aimed to strengthen and expand scientific connections among the academic community, thereby promoting active knowledge and experience exchange among scholars (Kachmar, 1999; Sukhy, 2013).

Kazimierz Twardowski made a significant contribution to the development of philosophy at the philosophical faculty of Lviv University by organising regular seminars on philosophy and creating a large library for students. His students, including Jan Łukasiewicz, Władysław Witwicki, Stanisław Leśniewski, and Kazimierz Ajdukiewicz, became well-known philosophers, psychologists, and logicians, most of whom focused on logic-philosophical issues. Among the professor-philosophers, Alexander Rączkowski stood out, researching the works of John Stuart Mill and Benedict Spinoza. In 1911, Mr. Twardowski, as the unwavering head of the Polish Philosophical Society, initiated the publication of the journal *"Ruch Filozoficzny"*, which became important for the scientific community (Sulym, 2011).

Y. Isayevych *et al.* (2007) note that significant changes in the infrastructure and nature of education at the university occurred at the end of the 19th and the beginning of the 20th centuries, when new buildings were

constructed for the chemical, geological-mineralogical, pharmaceutical, and physical institutes, as well as for the medical faculty and the university scientific library. The philosophical faculty underwent reforms, becoming an independent educational unit with graduates who had the right to teach in secondary schools and accumulated significant scientific potential. Such changes undoubtedly contributed to the university's development and the enhancement of its scientific potential. The beginning of the 20th century at Lviv University marked a new stage in the development of pedagogical education. In 1907, thanks to the initiative of Bolesław Mankowski, the Pedagogical Seminar was founded within the philosophical faculty. This event made a significant contribution to the training of future teachers, providing a more practical direction to the education process. Despite not having its own pedagogy department, the seminar provided a new impetus for the development of teacher education at the university. The autonomy of this unit covered a wide range of aspects – from organisational and financial to programmatic, scientific, and personnel issues – significantly reducing the dependence of pedagogical courses on the university administration. This innovation contributed to the improvement of the quality and content of education in the fields of pedagogy, didactics, and upbringing.

In the first decades of the 20th century, the Department of Slavic Philology at Lviv University, established in the late 19th century, continued to increase its activity and influence. The head of the department, Professor Antoni Kalina, continued to focus on the comprehensive study of Slavic languages and cultures, as well as on the development of ethnography in Galicia. The Ethnographic Society he created became a prominent scientific centre, where such distinguished scholars as Jan Baudouin de Courtenay and Ivan Franko worked, making a significant contribution to the development of Slavic studies. The journal *"Lud"*, published under the auspices of the society, remained an important source for researchers in Slavic philology and ethnography, retaining its role as a leading scientific publication in the new century. At the beginning of the 20th century, the tradition of studying Eastern languages at Lviv University received a new impetus thanks to the activities of the prominent Semitologist Mojżesz Schorr. He initiated the systematic teaching of Semitic languages such as Arabic, Hebrew, Aramaic, and Assyrian-Babylonian, significantly expanding the linguistic horizons of students and teachers. During this period, Sanskrit and Old Armenian were also introduced, further enriching the philological education at the university. The tradition of studying Eastern languages, laid down in the previous century, continued to develop in the 1920s and 1930s, confirming Lviv University's reputation as an important centre for linguistic research in Europe (Sulym, 2011).

In the 20th century, the Lviv historical school continued its development, deepening research in areas such

as legal and institutional history, literary studies, ethnography, and many others. Scholars who distinguished themselves during this period continued the traditions of their predecessors, enriching historical science with new methodological approaches and perspectives. Special attention was paid to studying the interaction of different cultures and civilizations, making the Lviv historical school a prominent centre of historical research in Europe. In the context of Ukrainian national history, significant contributions were made by Mykhailo Hrushevskyi. He made a revolutionary proposition in historiography at the end of the 19th and beginning of the 20th centuries, focusing on the study of the history of the people rather than the state, thereby creating a "place" for Ukrainian history and separating it, in particular, from Russian history. M. Hrushevskyi first outlined this approach in his reviews at the end of the 19th century and in a scholarly report in Lausanne (Paris) in 1903, as well as in his work "The Usual Scheme of 'Rus' History" and the book "Essays on the History of the Ukrainian People" in 1904. M. Hrushevskyi worked at Lviv University in 1894/1913, making an important contribution to the development of Ukrainian historical science (Zashkilnyak, 1999).

In the twentieth century, Polish historiography continued to consider history from a national-patriotic perspective, focusing on the rights of nations to self-determination. Notable is the analysis of reviews of the works of A. Petrushevych, where Polish and Ukrainian historians found common ground in criticising the lack of systematisation and professionalism in his works. Also, in this context, there is criticism of the author's specific language. This indicates a search for objectivity and professionalism in historical research aimed at distinguishing the Polish historical narrative from other national narratives, particularly the Russian one, while emphasising the uniqueness of the Ukrainian historical heritage.

■ The dynamics of scientific and educational processes at Lviv University at the beginning of the XX century

At the beginning of the 20th century, both Polish and Ukrainian historical science observed a tendency to harmonise scientific and theoretical standards between the two academic communities. Both sides were focused on supporting objectivity and scientific accuracy in historical research, striving to ensure unbiased study of history. In addition to historical research, the humanitarian environment of Lviv University was enriched by a powerful philological school, which, like historians, was united in the Literary Society named after Adam Mickiewicz. Founded in 1886, similar to its historical counterpart, this society, mostly composed of professors from Lviv University, played a key role in the development of philological research and the support of literary heritage. In 1911, the university acquired a new plot on the eastern outskirts of the city, the former estate of Ignacy Centre (now Cheremshyna Street, 44), with the aim of creating

a garden-museum of Galician flora. The diversity of the terrain allowed for the artificial reproduction of the natural vegetation of the region.

At the turn of the 20th century, despite the fact that the medical faculty of Lviv University had the highest growth rate of students among secular faculties, the share of medical students remained the smallest compared to other Austrian universities. A college was established at the medical faculty, making it the only place for medical personnel training in Galicia. The student body of the faculty was divided into regular and extraordinary students, with no free listeners. Initially, only men were admitted to the medical faculty, but according to the decree of the Ministry of Education dated September 3, 1900, women were also allowed to study in Lviv. Since 1905, foreign students have appeared at the medical faculty, including Poles from the Russian Empire who avoided studying in Russian schools. Their number during the period from 1905 to 1914 reached 124 people (Hulevich, 1960). By the beginning of the First World War, the medical faculty became a key centre for training medical personnel in the state, and the scientific achievements of its professors were recognised in leading European scientific journals.

As noted by O. Arkush (1999), Lviv University during this period grew into an important educational and scientific centre, which, along with Jagiellonian University in Krakow, formed a unique intellectual environment in Galicia. The Lviv scientific school boasted recognition in the form of honorary titles *honoris causa*, which the university senate awarded to prominent scholars and cultural figures, including Jozef Kraszewski, Marie Curie-Skłodowska, and Henryk Sienkiewicz. A significant achievement in the educational and scientific work of Lviv University was the celebration in 1911 of the 250th anniversary since its founding by King Jan Kazimierz on January 20, 1661. This event was symbolically commemorated by paying tribute to the university professors, including M. Smoluchowski, K. Twardowski, and Jan Boloż Antoniewicz. The anniversary was also marked by special publications reflecting the achievements of scholars.

At the turn of the 20th century in Galicia, the national conflict between Poles and Ukrainians intensified, which influenced changes at Lviv University related to Ukrainian efforts to establish their own national institution of higher education. Western historian Viktor Leyn points to a discussion between Polish and Ukrainian historians regarding the founding date of the university: the Polish side sees the beginning of the university's history in a privilege issued by King Jan Kazimierz in 1661, while Ukrainian historians, with certain differences in views, especially during Soviet times, consider the university to have been opened in 1784 by the decree of Austrian Emperor Joseph II, denying any connection with previous educational institutions prior to the dissolution of the Jesuit order in 1773 (Zashkilnyak & Serzenga, 2015).

In 1901, a proposal was made in parliament to open a Ukrainian university in Lviv. They argued that Lviv had all the prerequisites for the creation of a national university, but lacked the government's will, which preferred only those nations represented in the State Council (Kachmar, 1999). believed that establishing a university would be "a guarantee of national greatness" and would give Ukrainians "equality with other nations". His speeches reflect the first stage of the struggle for the establishment of a Ukrainian university, during which activists hoped for at least the consent of the Austrian authorities to the possibility of founding such a university in the future.

The secession of Ukrainian students from Lviv University in 1901/1902 became a significant stage in the struggle for the creation of a Ukrainian national university. This mass action, during which students left the educational institution and moved to study at other universities in Austria-Hungary, symbolised the completion of the first, legal stage of the struggle of Ukrainian students for the creation of their own higher education institution. A. Romaniuk (1931) believed that this event was notable not only for its scale but also because it caused various reactions among Polish political forces and society. One of the few positive reactions was the position of the newspaper "Kurjer Lwowski", which expressed support for the demands of Ukrainians. The newspaper emphasised that the opening of a "Ruthenian university in Lviv" could contribute to the development of Polish culture, and competition between national educational institutions would only strengthen the scientific capabilities of both sides. This case illustrates how the national question influenced educational policy in Galicia at the beginning of the 20th century, indicating that student actions served as an important catalyst for social change and played a key role in the struggle for national rights, which proved to be an extremely important aspect in an era when political and ethnic tensions were high.

The positive reaction of the Lviv Courier to Ukrainian aspirations regarding the establishment of their own national university in Lviv is evidence that the issue of the educational sphere was the subject of not only national but also broader cultural discourse (Lviv Courier, 1901). The newspaper's statement emphasises that the presence of a university representing Ukrainian intellectual and cultural heritage could not only contribute to the preservation and development of Ukrainian identity but also enrich the overall cultural palette of the region. Such a vision envisaged that cultural and scientific competition among different national groups could be constructive and contribute to general progress. This, in turn, underscored the importance of dialogue and mutual respect among various national communities in the process of education and science development. However, it is worth noting that not all Polish political forces shared this view, and in many cases, Ukrainian efforts encountered resistance, reflecting the complexity of national relations in Galicia at the beginning of the 20th century.

As I. Kurlyak (1997) believes, the position of Lviv University professor S. Stazhinsky reflected a more progressive and open approach to the issue of national education and scientific cooperation in Austrian Galicia at the beginning of the 20th century. Recognizing equal scientific opportunities for Ukrainians ("Ruthenians") and Poles testified to the recognition of the importance of Ukrainian scientific contribution and the necessity of providing them with appropriate conditions for the development of their own education and science. At the same time, Stazhinsky's position, which found resonance with Minister of Education and Religious Affairs Wilhelm Hartel, emphasised that at that time, there was political will at the level of government structures to support the idea of establishing a Ukrainian university, although this did not mean immediate realisation of this idea due to difficulties associated with national politics and social sentiments in the empire. This episode in the history of Lviv University is an important testimony to intellectual and political openness to dialogue and the development of national education, despite the presence of difficulties and challenges associated with the national question in the Austro-Hungarian Empire.

Development of the Ukrainian University in Lviv in the XX century: Policy and national identity aspects

A new stage in the movement for the creation of a Ukrainian university in Lviv was accompanied by democratic protests and national unrest in 1907, marking an important phase in the struggle for national education. The demands on the government for the establishment of a separate Ukrainian university, supported by prominent figures such as Yevhen Olesnytskyi and Metropolitan Andrey Sheptytskyi, underscore the societal importance of this issue and the readiness of the Ukrainian community to take active steps for their rights. The reaction of the school commission, which opposed the creation of a Ukrainian university, and subsequent clashes on a national basis between Ukrainian and Polish students within the walls of Lviv University, indicate deep national divergences and tension that existed at that time in Galicia. These events also reflect the complexity of the process of national self-determination for Ukrainians within the Austro-Hungarian Empire, where the struggle for educational rights was closely intertwined with the struggle for national recognition and self-expression. These events testify that the issue of establishing a Ukrainian university was not only an educational one but also a deeply political and national problem that required resolution in the context of broader social transformations.

A new phase of discussion on the issue of creating a Ukrainian university in Galicia was associated with the activities of Ukrainian ambassadors in the State Council. On December 16, 1907, an unpleasant incident occurred when Richard Weiskirchner, the chairman of the Chamber

of Deputies, refused to announce the events that took place at Lviv University at the beginning of the session. This provoked Ukrainian ambassadors to take actions that caused confusion among those present, which in turn led to a negative attitude towards the Ukrainian delegation from other members of the Austrian parliament. The Ukrainian press strongly condemned this incident, and the head of the Ukrainian parliamentary club, Y. Romanchuk, acknowledged that such actions were inappropriate.

However, as noted by V. Kachmar (1999), the Minister of Education and Religious Affairs, in response to the appeal of Ukrainian ambassadors, was forced to confirm that the actions of the Lviv University rectorate were carried out in violation of government instructions. In early 1908, Ukrainians initiated negotiations with Slovenes, Croats, Italians, and Romanians in the Austrian parliament, aimed at formulating a joint resolution on the university issue. They demanded that the government establish an independent "Ruthenian university" within the next five years and, from the new academic year, separate all Ukrainian departments into a "separate educational and scientific unit". However, this project was doomed to failure due to the strong influence of the Polish lobby in parliament and the murder of Ukrainian student Myroslav Sichynskyi by Galician Governor Andrzej Potocki (Stepankivsky, 1908).

Another attempt to raise the issue of creating a Ukrainian university in Lviv in the State Council was made against the backdrop of a government initiative dated January 20, 1909, to establish a law faculty in Vienna with instruction in Italian. In response to the government proposal, Ukrainian envoys S. Dnistrianskyi and O. Kolessa submitted a request for the establishment of a Ukrainian university in Lviv. However, on February 5, 1909, the session of the State Council was closed, and the request of the Ukrainian envoys was never considered. In 1910, the university issue was actively discussed in the State Council for two main reasons: Ukrainian representatives continued to emphasise the importance of creating a Ukrainian university, while the senate of Lviv University proposed legislatively securing the Polish status of the university. During a meeting with Minister of Education and Religious Affairs Count Karl Stürgkh on March 4, 1910, Y. Romanchuk and O. Kolessa expressed the readiness of the Ukrainian side to accept the Polish status of Lviv University on the condition of creating a separate Ukrainian university in Lviv. K. Stürgkh emphasised that any decision regarding Lviv University must be based on mutual agreement between Ukrainians and Poles on one side and the government on the other, emphasising that Vienna was applying the principle of preventing unilateral actions in this matter.

It is worth noting that on May 27, 1910, Ukrainian representatives Kost Levytskyi and O. Kolessa submitted a compromise proposal to Prime Minister Richard Biener regarding the reorganisation of the university: in the first stage, the creation of an autonomous university unit

from Ukrainian departments was envisaged, which would be granted the right to conduct exams and habilitation; subsequently, this unit was to be transformed into a full-fledged Ukrainian university in Lviv, while the existing Lviv University would become Polish. Throughout 1910, the issue of creating a Ukrainian university in Lviv was raised several times: on June 28, Mykola Vasylenko in the Chamber of Deputies, Metropolitan Andrey Sheptytskyi also addressed this issue, and during debates in the budget committee regarding the opening of a law faculty, E. Okunevskyi, K. Levytskyi, O. Barvinskyi, and others spoke (Levytskyi, 1926). The situation regarding Ukrainian higher education escalated after the tragic events of July 1, 1910, when student Adam Kotsko was killed during a conflict at Lviv University (Michalewska, 1984).

K. Levytskyi, speaking in the Chamber of Deputies on January 25, 1911, raised the issue of structural changes at Lviv University, proposing its division into Polish and Ukrainian parts. He proposed the separation of departments with Ukrainian as the language of instruction (three at theological, three at the legal, four at the philosophical faculties) from the existing university and the creation on their basis of a separate autonomous "university institution in Lviv" for the transitional period. In the future, with a sufficient number of departments teaching in Ukrainian, this institution was to be transformed into an independent Ukrainian university, while the existing university in Lviv would become exclusively Polish. In April 1912, new discussions began between Ukrainian and Polish politicians regarding the creation of the university. Ukrainians demanded that the university be established in Lviv within five years and remain *utraqvist*. Polish politicians understood that the matter was becoming irreversible and began anti-Ukrainian actions: Polish professors at Lviv University refused to assist in the training of Ukrainian academic staff (The Case of the Ukrainian University, 1912a; 1912b). They also sent a memorandum to Vienna protesting against the creation of a Ukrainian university, and the Lviv city council joined this protest.

The issue of creating a Ukrainian university in Lviv at the end of the 19th and early 20th centuries became one of the key areas of Ukrainian-Polish confrontation. This issue went beyond education and had a significant impact on the activities of the Galician Diet and the Austrian parliament. In his inaugural speech in 1911, Lviv University Rector L. Finkel (1901) noted that Polish scholars had always defended and would continue to defend the Polish character of the Lviv University. However, he also emphasised his responsibility for ensuring the "educational level of Ruthenian university forces". The rector argued that this reflected the Polish tradition in this matter. L. Finkel (1901) cited examples from history when the Polish side supported the establishment of educational institutions for Ukrainians. For example, King Vladislav IV issued a privilege for the establishment of the Kyiv-Mohyla Collegium. Also, under the terms of the Hadiach Treaty of 1658 with the Cossacks, the Polish side

supported the creation of an academy for Ukrainians (Oseredchuk, 2010). These examples indicate that some Polish scholars and politicians considered it important to promote the education of Ukrainians, although they also safeguarded the Polish identity of Lviv University.

It is important to note that according to the calculations of historian V. Kachmar (1999), at the beginning of the 20th century, the Ukrainian "presence status" at Lviv University was increasing. For example, in 1900, there were only six professorial chairs and one docent position for Ukrainians, but by 1914, this number had increased to eight chairs and four docent positions, and by 1918, to eight chairs and five docent positions. At that time, Polish politicians emphasised the presence of the Ukrainian language "within the walls of Lviv University". However, Ukrainians felt discriminated against, especially in legal science. For instance, from 1898 to 1910, only two Ukrainian instructors habilitated at the Faculty of Law, while there were nine habilitated Polish instructors, including foreign specialists (Kachmar, 1999).

Also, it is worth noting events related to the Department of Civil Law. After the death of Professor Omelyan Lopushansky in 1875, disputes arose regarding the appointment of a Ukrainian instructor to this department. This led to a confrontation between the Ukrainian community and the academic senate of Lviv University. In 1882, a Polish doctor, Alexander Ogonowski, was appointed as an extraordinary professor of civil law. However, after further disputes and Ogonowski's resignation, the issue of department leadership remained unresolved for almost seven years. The government allowed Ukrainian doctor Stanislav Dnistriansky to habilitate for the position of docent at this department in 1898, and he became an extraordinary professor in 1901. However, this event did not end the conflict, and the confrontation continued. In 1908, Dr. Volodymyr Verganovsky became a docent at the department of Austrian civil law, but this also led to further disputes over the department. These facts reflect the complex and tense context of the struggle for Ukrainian rights and representation at Lviv University at that time. In 1900, thanks to the support of Marshal of the Galician Diet Stanislav Badeni, the second department of Ukrainian language and literature was created, with a focus on Old Slavic language and literature. Kyrylo Studynsky was appointed as an associate professor of this department, who had previously worked at Jagiellonian University.

From 1908 to 1918, Ukrainians at the Faculty of Philosophy achieved the creation of departments of geography (Dr. Stepan Rudnitsky), Slavic literature (Dr. Ilarion Sventitsky), and the history of Austria (Dr. Stepan Tomashivsky). Also, from the 1890s, as an adjunct lecturer of Ukrainian language at the Faculty of Philosophy, Ilya Kokorudz continuously taught, the director of the Lviv Ukrainian Gymnasium. However, Count K. Badeni, who was the governor of Galicia and had the final decision on this matter, refused to allow I. Franko to work at the

university, citing his political past. This decision was confirmed by Minister of Education T. Ritner after a negative response from the governor. Ivan Franko expressed his desire to work at Lviv University, he tried to become a university lecturer in 1907 when the position of the sick professor A. Kalina became vacant. He appealed to the ministry to approve the decision of the philosophical faculty senate of Lviv University in 1895, which gave him the right to teach "Ruthenian literature" based on habilitation.

At the beginning of the 20th century, the student body became an increasingly important factor in university life. Lviv University, by the number of students, surpassed many European universities and was considered one of the leading ones in Austria. In the academic year 1913/1914, it had 5,871 students. The dynamics of gender indicators were also significant, by this time, there were 407 female students in the university in the winter semester of the academic year 1911/1912 (Sukhyi, 2011). Socio-political changes in relations in Galicia affected the structure of society, especially the social composition of the population. In the student environment, these changes led to a revision of the content and organisation of student life, as well as changes in their legal status and other aspects.

The national aspect was also significant. Poles constituted the majority of the student community, Ukrainians held the second position, and Jews stood third. Other nationalities were represented by smaller groups. In the academic year 1870/1871, Polish students accounted for 47.6%, in 1900/1901 – 47.6%, and in 1913/1914 – 44.6%. Ukrainians comprised, respectively, 41.0%, 31.3%, 25.9%, and Jews – 4.6%, 20.0%, 28.1%. Meanwhile, the share of Polish students remained stable, while the share of Ukrainians decreased, and the number of Jews increased in the university environment (Kubiyovych & Kuzel, 1993; Sukhyi, 2011). During the First World War, the university experienced a paralysis from August 1914 to June 1915. During this period, the university buildings were used by the Russian military authorities, and the educational process was suspended. The university administration and the majority of faculty members were in Vienna and actively assisted students who were evacuated from Lviv to Vienna, Prague, and other university centres.

In July 1915, after the retreat of the Russian troops, the university resumed its activities in Lviv, and teaching continued uninterrupted. At the beginning of the academic year 1917/1918, the university had 156 teachers, including 86 professors, 57 associate professors, assistants, and 12 lecturers. The number of students was 2,138, with 673 studying at the Faculty of Law, 525 at the Faculty of Philosophy, 666 at the Faculty of Medicine, and 274 at the Faculty of Theology (Hulevich, 1960). At the beginning of the 20th century, the Lviv university environment was saturated with ideas and transformations. Changes that occurred in the university and among the students reflected the general tendencies of that time. Democratisation became an important component of

this process, and achievements in science made a significant contribution to the global scientific space. Students of that period actively participated in the dissemination of new ideas and had diverse national and ideological-political views, reflecting the dynamics of that time.

Conclusions

At the beginning of the 20th century, Lviv and Lviv University experienced a turbulent period of change, encompassing political, social, and educational spheres. The increased activity of national groups, the expansion of university infrastructure, the creation of new departments, and reforms in the educational process all testify to dynamic development and adaptation to new realities. Lviv, as the capital of Galicia, played a key role in these processes, influencing the overall character of educational policy and shaping the scientific potential of the region. The humanities became increasingly significant: the Department of Slavic Philology, under the leadership of Professor Antoni Kalina, researched Slavic languages and culture, contributing to the establishment of the Ethnographic Society with prominent researchers such as Jan Baudouin de Courtenay and Ivan Franko.

Although the Medical Faculty had a smaller share of students compared to other universities, it played a significant role in training medical personnel. Gradually, the university transformed into a powerful educational and scientific centre, shaping a unique intellectual environment in Galicia, recognized by eminent scholars and cultural figures. An important aspect of contemporary life was the issue of establishing a Ukrainian university, which turned into a struggle for national self-identification. Discussions between Polish and Ukrainian historians regarding the founding date of the university, the secession of Ukrainian students in 1901/1902, lively press discussions, and political debates all testify to the sharpness and complexity of the national question in the context of educational policy.

Ukrainian political representatives actively lobbied for the establishment of a Ukrainian university but faced stiff resistance from Polish colleagues. This process proved to be long and complex, as besides political and interethnic contradictions, bureaucratic obstacles had to be overcome. Relations between Ukrainians and Poles in

the university environment during the 19th and early 20th centuries were ambiguous. On the one hand, the Polish side to some extent supported educational initiatives for Ukrainians, while on the other hand, they safeguarded the Polish identity of the university. Ukrainians felt discrimination, especially in the field of legal science. The First World War temporarily paralyzed the operations of the university, but after the retreat of the Russian troops, it resumed its activities. The university environment of that time generally reflected the democratic tendencies of the era, and the students' activism in spreading new ideas testified to their role as catalysts for social change.

Such research on the dynamics of change and the struggle for identity at Lviv University at the beginning of the 20th century provides valuable insight into the historical context in which the modern education system in Ukraine was formed. This knowledge helps to better understand the challenges and difficulties faced by Ukrainians in their quest for national self-identification and access to education in their native language. Analysing the experience of Lviv University provides valuable insights for contemporary education policy in Ukraine. Studying how the university adapted to new political and social realities, how issues of language of instruction and national identification were addressed, can help shape an effective and fair educational system in modern Ukrainian society.

Research into the history of Lviv University at the beginning of the 20th century is of great importance for preserving historical memory. This knowledge helps to remember the value of education, the struggle for Ukrainian identity, and the importance of democratic values in societal development. Studying the scientific achievements of Lviv University scholars at the beginning of the 20th century can stimulate the development of Ukrainian science in various fields. This knowledge can help restore and preserve the legacy of prominent Ukrainian researchers and provide impetus for new scientific research.

Acknowledgements

None.

Conflict of Interest

None.

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Наукові школи та суспільні рухи у Львівському університеті на початку XX ст.: історичне дослідження

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Анотація. Актуальність теми дослідження полягає у важливості розуміння історичного контексту, в якому формувалися наукові школи та суспільні рухи Львівського університету на початку XX століття, що дозволить краще зрозуміти сучасні наукові та соціокультурні процеси, а також сприятиме відкриттю нових перспектив у дослідженні історії університетського середовища та його впливу на суспільство. Мета дослідження полягає в систематизації та аналізі історичних подій та процесів, які стосуються розвитку освіти та науки у Львові на початку XX століття, з метою зрозуміння їхнього впливу на сучасне соціокультурне середовище. У ході роботи були використані методи архівного дослідження для аналізу документів, що містять інформацію про діяльність університету, та історіографічний аналіз для огляду та дослідження наукових праць та джерел, що стосуються його ролі в соціокультурному контексті. В результаті дослідження встановлено роль Львівського національного університету на початку XX століття у модернізації освітньої та наукової сфери Галичини через архівне дослідження архівних документів, що містять інформацію про діяльність університету, його засновників, адміністрації, навчальний процес, студентське життя, а також через історіографічний аналіз наукових праць та джерел, що стосуються його ролі в соціокультурному контексті; проаналізовано вплив університетського середовища на громадсько-політичне життя регіону та студентські ініціативи; узагальнено ідеї створення окремого українського університету як важливого кроку у національній самоідентифікації та розвитку освіти в Галичині. Результати дослідження можуть бути використані для створення історичних наративів, документування розвитку освіти та науки в регіоні, а також для збереження та вивчення культурної спадщини.

Ключові слова: природничі науки; стислі науки; університетське середовище; академічна сфера; Галичина; соціокультурний контекст; український університет у Львові



Sentyivskyi Shantse as a component of the defensive structures of New Serbia: Historical and archaeological aspects

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Abstract. The relevance of the research topic is manifested in the context of the unique geopolitical position of Potyasmynia and the broader region of the "Zadniprovian lands" of the Hetmanate and New Serbia in the mid- to late 18th century. This period was characterised by acute political and military transformations, which led to intensive construction of fortifications, including the Sentyi Shantse. Considering the importance of understanding the historical context and significance of defensive structures in this region, the study of the Sentyi Shantse becomes an essential element in unravelling historical events and processes. The aim of the study is a comprehensive elucidation of the historical significance of the Sentyi Shantse, the stages of its historical existence and fate, relying on the use of historiography, cartography, and archaeology data. In addition to general scientific methods, the authors employed special-historical methods, namely: chronological, historical-typological, and cartographic methods, which allowed for balanced and well-founded research results. The research included a historiographic analysis of scientific works, identifying the specificity and differences in the vectors of shantse research in scientific sources from the second half of the 18th century to the beginning of the 20th century and contemporary history. The predominance of the goals of historical anthropology was established. The specificity of the two main periods of studying the Sentyi Shantse in the system of defensive structures of Potyasmynia in the mid- to late 18th century was determined and characterised. Six chronological stages in the history of the shantse were identified and characterised. The results of its archaeological research were introduced into scientific circulation and analysed. The practical value of the work lies in the possibility of applying the research results in the study and writing of works on local history topics, in the preparation of lectures on regional and Ukrainian history, as well as in their use in highlighting the history of the region in museum activities

Keywords: Zadniprovian lands; Hetmanate; Cossacks; Serbs; settlers; fortification structures; regiment

Introduction

The territory of modern Kirovohrad region, along with its fortification structures in the 18th century, played a significant role in complex geopolitical processes. This

was due to its location along the border between the Polish-Lithuanian Commonwealth, the Ottoman Empire, and the Russian Empire. On one hand, it served as

Suggested Citation:

Shatkovskyi, V., & V Tupchiienko, M. (2023). USA Sentyivskyi Shantse as a component of the defensive structures of New Serbia: Historical and archaeological aspects. *Society. Document. Communication*, 8(3), 86–94. doi: 10.69587/sdc/3.2023.86.



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a bastion for asserting Ukrainian statehood in the form of the "Zadniprovia lands" of the Hetmanate. On the other hand, this territory not only became a springboard for the Russian Empire's advance into the Right-Bank Ukraine in the second half of the 18th century, resulting in the partitions of the Polish-Lithuanian Commonwealth, annexation of the Crimean Khanate, and the liquidation of the Zaporizhian Sich, but also led to the incorporation of most territories inhabited by Ukrainians into one state. The latter contributed to a sense of shared historical destiny among Ukrainians, which significantly fostered unity in their attempts to revive their own statehood in the early 20th century, ultimately culminating in the formation of the Ukrainian Soviet Socialist Republic (USSR). In these complex geopolitical processes, fortification along the border territories had its own special mission, associated with the necessity of defending the state's borders, cities, and villages. Simultaneously, the fortification structures of the 18th century (including the trenches of New Serbia) played a significant role in shaping modern settlements. The Sentivskiy Shanets is no exception to this rule. In light of the above, the study of the role and place of the Sentivskiy Shanets in the fortification system of Potyasmynia becomes relevant as a component of addressing the comprehensive issue of the peculiarities of settlement and development of the region, as well as the role of fortifications in this process.

Since the topic of the article is under-researched and the historiographical analysis of works related to this topic is presented in the results and discussion, we will focus below on the characterisation of works whose subject matter is relevant to the stated problem. Thus, relevant to the researched topic is the study by S. Didyk (2009) on the history of the Novoslobodsky Cossack Regiment (1753-1764), which was formed from settlers of the Myrhorod Regiment of the Hetmanate as a result of the creation of New Serbia (1751). The author does not specifically address the issue of fortification in the region but notes the role of regimental trenches in its defence to the south, showing the destructive consequences for the settlements of the Novoslobodsky Regiment of the Crimean Khanate's campaign at the head of a 70,000-strong army in 1869. The reasons, nature of settlement, economic life, and administrative subordination of the Zadniprovia lands at the end of the 17th – mid-18th centuries are considered in several publications and dissertation research by A. Butko (2018; 2021). In particular, the author classifies the settlements of the region, identifies the number and specialisation of fortifications of the Myrhorod and Poltava Regiments within the Zadniprovia territories, but does not dwell on their detailed characteristics.

Historical, museological, and archaeological research of the internal space of the fortress of St. Elizabeth – the main citadel in the structure of fortification of New Serbia and the Novoslobodsky Regiment – is devoted to a number of works (Tupchiienko, 1994; Tupchiienko

& Shatkovskiy, 2022). In particular, based on the results of the excavation of the gunpowder cellar in the bastion of St. Peter, two publications raise the issue of the museumification of the fortress, a prospective plan for comprehensive research of its history, and inclusion in the museum and cultural-tourist space of contemporary Kirovohrad. The author identifies at least three areas of fortress research: historical, archaeological, and museological. In further research, scientists found reflection of the results of the search for the localization of the so-called "ambassadorial palace", non-invasive methods and results of the study of the gunpowder cellar in the bastion of St. Catherine and 2 wells-basins, protective excavations at the site of the installation of the flagpole with the highest flag in the region (Tupchiienko & Shatkovskiy, 2022). K. Shlyakhovyi (2005) draws attention to the Serbian origin of the names of a number of toponyms in the Kirovohrad region. The author concludes that the names of settlements and fortifications within the Former New Serbia, including the Sentyi Shantse, were transferred by settlers from their homeland to new territories in Potyasmynia. The researcher reveals their etymology and provides analogous names of settlements in Serbia, traces the significance of the fortification of New Serbia in the context of world and local history. In turn, O. Chorny (2020a) based on satellite images, available sources, and publications carried out a graphic and artistic colour perestroika of the external appearance of the Sentyshchansky fortress as it was during its heyday in the early second half of the 18th century. The perestroika allows visualising not only the external appearance of the defensive structures of the trench but also showing the layout and planning of its internal space. The mentioned works pay attention to various aspects of settlement and functioning of the fortifications of the Zadniprovia lands of the Hetmanate, New Serbia, and the Novoslobodsky Regiment during the 18th century, but they lack a detailed analysis of the history of the emergence, functioning, and fate of the Sentyshchansky trench.

Thus, the aim of the study is to provide a comprehensive characterization of the Sentyshchansky trench based on cartographic sources, historiographical analysis, and archaeological materials, determine its place in the defensive structure of Potyasmynia, identify its participation in military events, and also show the prospect of further research.

Materials and Methods

Special historical methods were employed in writing this article: chronological, historical-typological, and cartographic. These methods allowed for the systematic organisation and analysis of historical data, considering aspects of the formation and functioning of the Sentivskiy Shanets within the context of settlement stages in the region. The chronological method enabled researchers to examine the development of the

Sentivskiy Shanets clearly in temporal sequence. By analysing various historical periods, they identified and analysed the stages of its historical existence. This provided insight into changes in the structure and functional purpose of the fortification throughout different historical periods. The historical-typological method identified the typicality of fortification planning, its structure, and the main components of its construction. Through this approach, characteristic features of the Sentivskiy Shanets were identified and compared with similar fortifications in other regions. The cartographic method was essential for coordinating cartographic data with descriptions of the territory and the location of defensive structures. It allowed for a more precise understanding of the dimensions and geographical location of the Sentivskiy Shanets.

In addition to the methods mentioned above, a variety of sources were used in the research, including published and unpublished archival materials, such as the description of the Novoserb Corps Chancellery fund (Milchev & Prosunko, 2005), a published fragment of Baron Ferenc de Tott's diary, an eyewitness of the winter campaign of Kırım-Girei onto the territory of New Serbia in 1769 (Baron Ferenc de Tott, 1785; Yastrbov, 1883), J.A. Gildenstedt's travel diary in the Yelysavethrad province with additions by V. Yastrbov (Gildenstedt, 2023), Compilation of the Laws of the Russian Empire (Complete Collection of the Laws...n.d.); reports on archaeological excavations by Bessonova (Bessonova, 1987); cartographic materials, namely, fortification plans from the mid-18th century – archive of V.T. case No. 912 created in 1756 and case No. 25561 formed in 1762 (Laskovskiy, 1865) reports of archaeological surveys (Bessonova 1987; Sobchuk 2020), as well as articles and monographs, chronologically divided into two groups: 1) publications from the 19th to the beginning of the 20th century; 2) research conducted in independent Ukraine from the end of the 20th to the beginning of the 21st century.

Results and Discussion

The first fortifications in the Back Dnieper lands of Hetmanate began to be built in the 1740s with the aim of protecting the territories of the right bank of Tiasmyn

from encroachments by the nobility of the Polish-Lithuanian Commonwealth by settlers from the Myrhorod and Poltava regiments of Hetmanate. In 1751, these lands were transferred to military settlements of New Serbia. By the order of Empress Elizabeth, Serbian settlers were allowed to settle along the border with Poland and Turkey (Polonska-Vasylenko, 1960). Serbian settlers did not lose their military status and automatically became part of the Russian army structure, and the fortifications of the Back Dnieper lands of Hetmanate became part of the defensive line of New Serbia. As a result, two Serbian regiments were created by the Russian authorities: the Pandur (infantry) and the Hussar (light cavalry). Each regiment was divided into companies with their permanent locations. Each company was supposed to be provided with its own defensive fortifications.

One such defensive fortification was the Mogilev or Sentyi Shantse, located near the modern village of Rodnikivka in the Kropyvnytskyi district of the Kirovohrad region. This settlement was founded and inhabited by Cossacks and commoners of the Myrhorod Cossack regiment as part of the Back Dnieper lands of Hetmanate under the name Mogilev. After the liquidation of the Back Dnieper lands and the transfer of their territories for the formation of military settlements of New Serbia, Mogilev was renamed Senta, in honour of one of the shants of the Potisje Border (now the city of Senta, Autonomous Province of Vojvodina, Serbia and Montenegro) (Shlyakhovyi, 2005).

The first detailed description of the Sentiv fortification was made by the renowned historian and geographer J.-A. Gildenstedt, who described the journey through the region in detail. In his diary entries, the fortress as of May 26, 1774, appears as follows: "...a correctly four-cornered fortification measuring 400 fathoms in diameter, but it is uninhabited and is used only as a shelter in extreme cases" (Gildenstedt, 2023), meaning that at the time of the description, this fortification was no longer functioning as a permanent defence, was not provided with military garrison, and was intended only for extreme cases, which is understandable, as this description was made towards the end of the Russo-Turkish war of 1768-1774, when such fortifications in the interior of the empire lost their relevance (Fig. 1).



Figure 1. Panoramic depiction of the Sentyshchansky fortress

Source: author's development

More than half a century after the description by J.-A. Gildenstedt, the 19th-century historian A. Skalkovskiy (1836) in his work "Chronological Overview of the History of New Russia 1731-1823", describing the processes of settling this territory, provides a list of fortifications established to form a new defensive line, among which the Sentivskiy Shanets is mentioned under its original name – Mogilev. Examining the reasons and purpose of creating New Serbia, the researcher emphasises that the main goal of establishing Serbian settlements included preparing soldiers who would gradually increase their presence and could eventually surround Tatar and Turkish possessions, squeezing the Zaporozhian Cossacks and expanding the borders of the Russian Empire to the Black and Azov Seas, or at least forming

an insurmountable defence line against southern enemies. As we can see, this researcher clearly identifies the prospective plan of the Russian imperial government, which envisaged three goals: 1) creating an invincible defensive line against Tatar and Turkish raids, and ideally surrounding and displacing them; 2) limiting the possessions of the Zaporozhian Cossack autonomy; 3) reaching the shores of both seas, thereby providing conditions for further territorial expansion, which would happen in the second half of the 18th century. In light of the events of the Russian-Ukrainian war of 2014-2024, we see that the aspirations of Russian imperialism remain unchanged.

In turn, the Sentyi Shantse was cartographically localised on the layout of the fortifications of "New Serbia" in the album appendix to F. Laskovskiy's work (1865) (Fig. 2).

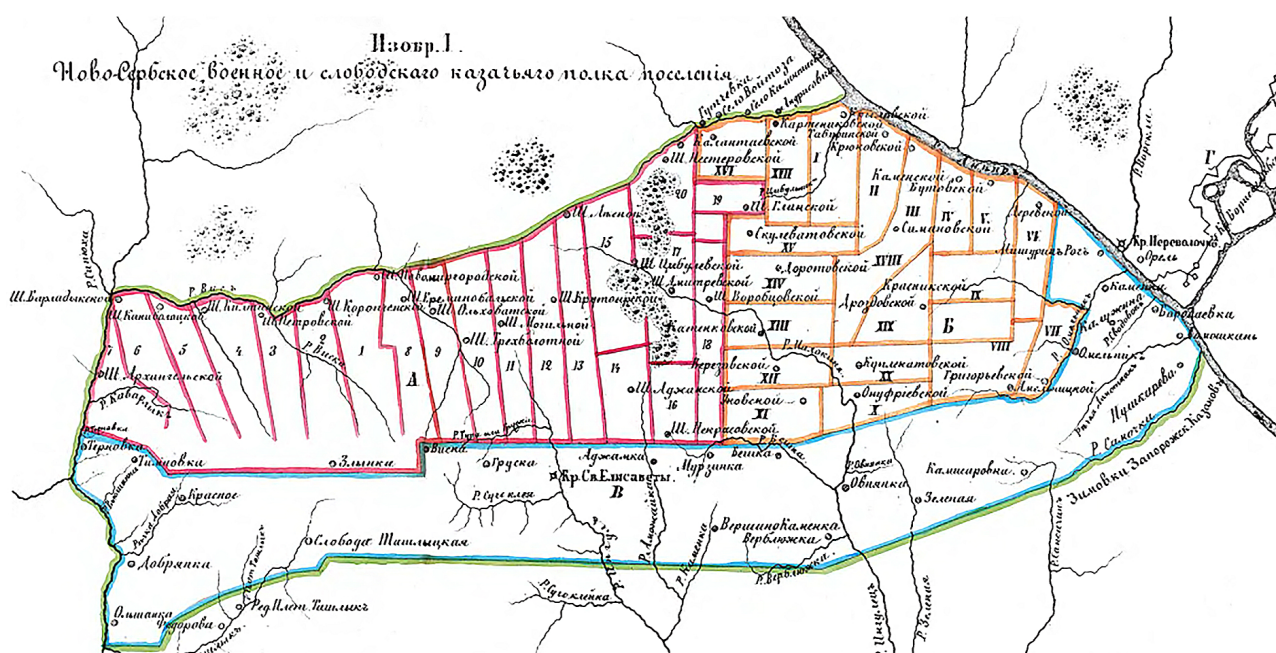


Figure 2. Novoserbske Settlement of the Sloboda Cossack Regiment

Source: F. Laskovskiy (1865)

The author based the study on the map created at the beginning of the military settlements formation in 1756 (Laskovskiy, 1865). The scheme shows the exact localisation of fortifications as of 1756 on the left bank of the Tiasmyn River on the border with the Polish-Lithuanian Commonwealth. Additionally, this scheme was accompanied by a detailed description of the fortifications and their garrisons, including the Sentivskiy Shanets. According to the description, 11 squadrons of the hussar regiment, consisting of 98 personnel each, were permanently based in the fortification (Tserovyc, 2002). Adjacent to it were the Kanizh Shantse with the garrison of the 10th squadron and the Vukovar Shanets with the garrison of the 12th squadron of the same regiment. In total, two regiments of Serbian military settlers were created, the pandur infantry and the hussar cavalry, totaling 40 squadrons with their fortifications and places of

permanent deployment. The distance between squadrons was 8.5 kilometres for hussar squadrons and 6 kilometres for pandur infantry squadrons in the forest-steppe part of the territory. In the steppe part of New Serbia, the distance between cavalry squadrons was 32 km, and between infantry squadrons was 27 kilometres, reflecting the military logistics capabilities in different landscapes. Each of the mentioned shants, including the Sentyi Shantse, also had several observation points – outposts located several kilometres away.

According to the scheme and description by F. Laskovskiy (1865), data on the construction of the entire line of fortifications are provided, where the Sentyi Shantse still appears under its first name Mogilev, known on the maps of New Serbia in 1756. Overall, the appearance of these defensive structures corresponds to typical plans of earthen fortifications of the Russian Empire in the

18th century. As an example, the author mentions the Petroostrov Shanets (modern village of Petro-Ostrov). Similar fortresses are also present in the structure of the left-bank Ukrainian defence line, which was formed in the 1730s-1740s on the Left Bank, including the Mykhailivska (Kyselivska) fortress and Slovianoserbiya. The researcher also provided a list of typical internal structures for such fortresses, namely: the presence of a church, commandant's house, officers' quarters, commissary store, powder magazine, and settlement in the closest vicinity of the fortress – its forecourt. Overall, F. Laskovskiy's cartographic scheme and description were based on extensive archival materials, namely "Plans of fortifications of the mid-18th century archive V.T" case No. 912 created in 1756 and case No. 25561 formed in 1762, currently stored in the archives of the Russian Armed Forces, providing the most complete picture of the functioning of the shantse in the conditions of its inclusion in New Serbia and the relevance of its defensive functions.

In 1907, V. Nikiforov conducted an analysis of the works of A. Skalkovskiy and F. Laskovskiy with the aim of determining the state of church affairs in military settlements. He provided a characterization of the state of the Sentyi Shantse and a brief description of the fortress based on previous research. He also drew attention to the church aspect in the history of the Sentyi Shantse. According to Vasil Nikiforov in "Materials for the history of the emergence of churches in the Alexandrovsky district", on April 25, 1759, a church named "In the Name of the Descent of the Holy Spiri" was founded in the fortress (Nikiforov, 1907). The church was established in accordance with the typical requirements for a shantse, but six months after the start of construction, a decision was made to move the church beyond the fortress, as evidenced by case No. 148/6 (Milchev & Prosunko 2005). The author merely states the fact of relocating the church outside the shantse but does not provide an explanation for it.

Contemporary Ukrainian researcher O. Koval (2019) sees the reason for relocating the church in a decree dated August 9, 1754, which states that "existing churches in the areas allocated for New Serbia, built by former settlers without specified settlements, who are moving or settling in the newly designated areas beyond the borders of New Serbia, for the satisfaction of Serbs who are resettled, should not be moved, and churches should be built for the local settlers in their new settlements from the state funds of Major-General Glibov, at his discretion" (Complete Collection of the Laws..., n.d.). According to this decree, churches were supposed to remain in place for the satisfaction of Serbs, while for resettled Ukrainian population in new areas, churches were to be built anew at the state's expense. However, due to the small number of Serbs, churches were deserted, and requests for relocating the churches from the shantse locations were rejected. At the same time, the researcher notes that not only the Sentyivskyi Shanets experienced church relocation but also several others. For example,

in 1753-1754, the Mykolaivska church was moved from Ukhivka to Vershino-Kamianka, the Troitska church from Fedorka to Pregrodka, the Preobrazhenska church from Tsybulivska sloboda to Adzhamka, and the Bogoslovka church from Butivka to Buyanska (Koval, 2019). In our view, such church relocations could have been prompted by the contemporary reality of gradation of settlements in rural areas, namely, their division into "villages" and "towns". The main criterion distinguishing "towns" from "villages" was the presence of a church. Since New Serbia was conceived and created as a military settlement, where the population combined military service with agriculture and family life in settlements outside the fortifications, raising the status of such a settlement by relocating a church there became not only relevant but also urgent. Moreover, churches in settlements of the 18th-19th centuries, especially in newly founded ones, played the role of their organising centre in space and culture.

Therefore, summarising the achievements of historians of the 18th to the early 19th century in the study of the Sentyivskyi Shanets of New Serbia, it is important to note that they collected and processed archival material, mapped the location and connection with similar shantse, and linked the history of the shantse with the church. At the same time, most of these works were descriptive in nature, with only occasional broader generalisations and searches for reasons for the emergence of fortification activity in New Serbia, which fully corresponded to the level of development of contemporary historical science and the values prevailing in society. The present demands something different. Anthropological aspects of history in everyday, interethnic, social, cultural, and other dimensions of life are becoming relevant.

Accordingly, modern researchers V. Milchev & O. Prosunko (2005), by processing and structuring the remnants of the fund and publishing the archival description of the "Office of the Novoserbsky Corps", which was previously stored in the state archives of the Dnipropetrovsk region (DADO) and was virtually destroyed as a result of military actions in the autumn of 1943, focus their attention on the anthropological aspects of the history of the Sentyivskyi Shanets. This description chronologically reproduces episodes from the life of the military settlement and the Sentyi fortress. In particular, according to the case 371 201.86 "Case on the report of Captain Boshkovich about the commissioned work in the Sentyivskyi Shanets for state buildings, barracks, and gate hinges and nails and the allocation of money for it" repairs of the shantse gates and barracks were carried out in 1760. For this purpose, the imperial government allocated 39 rubles 50 kopecks. (Milchev & Prosunko 2005). According to the description of the "Office of the Novoserbsky Corps" fund, it contained a document dated June 6, 1762 – "Protocol of the officer council of the Novoserbsky corps regarding measures to strengthen the defence capability of New Serbia in case of possible attacks from the Crimean Khanate", which also men-

tions the need to implement previous orders regarding the mandatory fencing of churches in the shants with palisades), that is, defensive structures made of vertically driven logs or poles (Milchev & Prosunko, 2005; Kovaleva, 2019). The content of the protocol indicates preparations for war with Turkey, the government's desire to maintain fortifications in proper condition, and possibly to expand its garrison.

According to the fund description, in 1762, a customs outpost was established based on the shantse between New Serbia and the Polish-Lithuanian Commonwealth, which allowed various people with goods and provisions to pass through. The reason for the establishment of trade restrictions was the creation of a border commission by the Senate decree of October 17, 1762, due to the construction of a fortress in Uman by the Polish-Lithuanian Commonwealth. Moreover, V. Milchev & O. Prosunko (2005) note that most misunderstandings and border conflicts arose due to the struggle for settlers. A similar situation regarding the struggle for settlers is described by N. Polonska-Vasylenko (1960). According to the documents of the fund, Polish nobles made raids into the territory of New Serbia to plunder and forcibly relocate locals to Poland. The Novoserbian military administration followed a similar practice, exacerbating relations (Milchev & Prosunko, 2005). In both cases, there was a struggle for settlers. Captured people could eventually be turned into serfs (on the Polish side) or into military settlers and serfs (on the Novoserbian side). The point is that according to the agreement between Ivan Horvat and the imperial government, four regiments were to be formed on the territory of New Serbia, two infantry (pandur) and two cavalry (hussar) regiments from settlers from Austria-Hungary, but in reality, only two regiments were formed (Skalkovskiy, 1836). The shortage of settlers was attempted to be compensated locally by conducting raids into the territory of the Polish-Lithuanian Commonwealth, into Moldova subordinate to Turkey, and so on. However, as the authors of the description note, despite the border clashes, trade continued to develop. Therefore, the shantse served not only as a place of defence for the civilian population but also as a control and transit point in trade operations between states. (Milchev & Prosunko, 2005).

After the liquidation of New Serbia, the Sentivskiy fortification of 1764 became the centre of the 11th squadron of the Black Hussar Regiment. The toponym "Senta" formed the basis for the name of the small village of Sentiivske, which emerged near the fortification in the second half of the 18th century (Chornyi, 2020b). However, according to available sources, it was not possible to determine the time and circumstances of renaming the shantse from Mohyliv to Senta. It is known that until 1756, according to cartographic sources, the shantse was still called Mohyliv. At this time, as indicated in the above description by J.A. Guildenstedt, the Sentyi shantse was used only as a refuge in case of military actions. In

this sense, the involvement of the fortification itself or its garrison in military actions during the winter campaign of the Crimean Khanate (1769), as there are no records of combat near Sentiivske in Baron Tott's notes. After the annexation of Crimea by the Russian Empire (1783) and the accession of almost the entire Northern Black Sea region to the empire and its final consolidation in 1791, as well as after the first (1772) and subsequent partitions of the Polish-Lithuanian Commonwealth, the Sentivskiy Shanets, along with other fortifications of Potemkin's Wall, lost the status of a border fortress and finally turned into an internal settlement. Fortification structures on the internal territories were to be destroyed or left in the condition they were at the time of the decree. At the same time, the senate left it to Prince Potemkin to make a final decision regarding the fortresses and their military property. Obviously, for the sake of saving human resources and funds, the fortifications of the former New Serbia were not destroyed, similar to the fortresses of the Ukrainian Line on the Left Bank (Complete Collection of the Laws..., n.d.).

Since then, the fortification structures of the Sentivskiy Shanets stood until the mid-20th century. The actual destruction began actively in the Soviet era in the 1950s. The territory of the fortress is gradually being reclaimed for agricultural needs. By the order of the head of the Rodnykivska village council, the land from the rampart of the fortress was used to create an artificial pond, significantly altering its appearance. Only the eastern rampart remains of all defensive ramparts. In subsequent archaeological surveys by S.S. Bessonova in 1987, only the remains of this rampart were recorded. The researcher notes: "Next to mound 8, remains of a plowed rampart are traced. According to local residents, there was a so-called Turkish fortress here – a rectangular earthen fortification with an area of 3-5 hectares. No archaeological finds have been found on this territory. It is likely the remains of a 17th-century fortress" (Bessonova, 1987). Thus, by the end of the 20th century, local residents no longer remembered the true ownership and history of the Sentivskiy Shanets.

In 2006, V. Biloshapka (2007) conducted a visual inspection of the fortress. The researcher indicated that a part of the rampart up to 50 metres long and 5 metres wide is preserved in the western part of the former fortification. The height of the rampart reached two metres and was covered with steppe vegetation. A part of the rampart resembles a burial mound, which misled robbers, resulting in the laying of a robber trench containing wooden remains. The local historian claimed that the wooden remains are tentatively dated to the mid-18th century. The researcher speculated that this wooden fragment is a remnant of the internal or external ramparts of the fortress. In 2020, at the request of the local authorities of Rodnykivka village, an inventory of cultural heritage sites was conducted, during which the object was recorded and documentation was created for this

fortress. According to the decision of the head of the Kirovohrad Regional State Administration dated June 3, 2021, the monument was included in the list of newly discovered cultural heritage sites (Order of the head of the Kirovohrad Regional State Administration No. 437-r dated June 3, 2021), which currently allows halting the gradual destruction of the object.

The accounting documentation for the newly discovered cultural heritage site, compiled by V. Sobchuk (2020), provides a modern description of the fortification structure. According to the description, a partially preserved northern curtain, 145 metres long, 7 metres wide, and 1.5 metres high, and a fragment of the north-eastern bastion, used as a point of the state geodetic network, with a height of 2.3 metres, length of 9 metres, and width of 15 metres, are recorded. photos 1 and 2 Also recorded are the remnants of the southwestern bastion, which has a diameter of 35 metres and a height of 0.4 metres. The inner part of the fortification along the perimeter within the curtains and bastions that are traceable, as well as the ruins, covers an area approximately 250 metres long and wide.

Archaeological surveys conducted by V. Sobchuk (2020) have revealed the existence of a cultural layer within and beyond the fortress territory, typical of settlements from the mid-18th to early 19th centuries. Satellite imagery analysis identified promising areas for further exploration to determine the location of barracks and other likely structures. A return visit to the fortress allowed for the localisation of archaeological artefacts in four areas within the fortress, indicating the presence of a pronounced cultural layer within its confines. Additionally, remnants of internal structures, likely barracks, an arsenal, and gatehouses, are recorded within and near the fortress rampart.

Thus, in the context of the defensive structures of "New Serbia", the Sentyivskyi Shanets emerges as a significant component, attesting to the historical and archaeological complexity of this defensive system. Research in this area provides a deeper understanding of the role and structure of defensive fortifications in forming the defensive line. In turn, the analysis of historical and archaeological aspects of the Sentyi Shantse has helped uncover the strategic importance of this structure and its impact on the defensive strategies and events of that period.

Conclusions

Thus, the conducted research has allowed for the pe-restroika not only of the key milestones in the history and functioning of the Sentyivskyi Shanets but also for

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the analysis of their peculiarities, the connection of the fortification with the settlement processes of the region, its ethnic, religious, economic, and political history. Specifically, the following stages of its emergence and operation were identified: 1) the appearance of the shantse preceded by the Ukrainian settlement of Mohyliv – a component of the Myrhorod Regiment of the Hetmanate, 2) the construction of the fortification and the renaming of the settlement and shantse to Senta were linked to the creation by the Imperial Russian government of New Serbia and the replacement of the Ukrainian population with Serbian settlers; 3) in 1762, a customs outpost with the Polish-Lithuanian Commonwealth was formed based on the shantse; 4) after the liquidation of New Serbia in 1764, the shantse became the base for the location of the 11th Squadron of the Black Hussar Regiment; 5) by 1774, the shantse had practically lost its significance as a border military and customs outpost and gradually declined but was not destroyed; 6) during Soviet times, in the mid-20th century, most of its defensive structures were destroyed. Moreover, the conducted historiographic analysis allowed for the identification of the specificity and differences in the direction of shantse research in the scientific literature from the second half of the 18th century to the beginning of the 20th century and the present, particularly determining the prevalence of goals of historical anthropology, whereas in the past descriptiveness, material collection, and the study of church history predominated. At the same time, the detailed establishment of the location of specific structures, their purpose, requires further research through excavation, which determines the prospect of further research. Therefore, conducting comprehensive archaeological work within and beyond the defensive structure will help refine the geographic coordinates of the stages and features of the fortress's operation, clarify its participation in military events, including the winter campaign of the Tatars in 1769, reveal the process of its degradation as a defensive structure after losing its military significance at the end of the 18th century. Possibly, in the future, this fortress will become a key point for the development of research into events of the second half of the 18th century on the border with the Polish-Lithuanian Commonwealth.

Acknowledgements

None.

Conflict of Interest

None.

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Сентівський Шанець як складова оборонних споруд «Нової Сербії»: історичний та археологічний аспекти

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Анотація. Актуальність теми дослідження проявляється у контексті особливого геополітичного положення Потясминня та ширше регіону «Задніпрських місць» Гетьманщини й Нової Сербії у середині – другій половині XVIII століття. Цей період характеризувався гострими політичними та військовими перетвореннями, що зумовили інтенсивне будівництво фортифікаційних укріплень, зокрема, Сентівського шанцю. Враховуючи важливість розуміння історичного контексту та значення оборонних споруд у цьому регіоні, дослідження Сентівського шанцю стає важливим елементом в розкритті історичних подій та процесів. Метою дослідження є комплексне висвітлення історичного значення Сентівського шанцю, етапів його історичного існування та долі, спираючись на використання даних історіографії, картографії та археології. Під час написання цієї статті автори окрім загальнонаукових методів використовували й спеціально-історичні, а саме: хронологічний, історико-типологічний та картографічний методи, що дозволили досягти виважених та обґрунтованих результатів дослідження. У результаті проведеного дослідження було здійснено історіографічний аналіз наукових праць. Визначено специфіку та відмінності векторів досліджень шанця в наукових джерелах другої половини XVIII ст. – початку XX ст. й сучасної історії. Встановлено переважання цілей історичної антропології. Визначено специфіку двох основних періодів вивчення Сентівського шанця в системі оборонних споруд Потясминня середини – другої половини XVIII ст. Встановлено та охарактеризовано 6 хронологічних етапів історії шанця. Введено в науковий обіг та проаналізовано результати його археологічних досліджень. Практична цінність роботи полягає у можливості застосування результатів дослідження при вивченні та написанні робіт на краєзнавчу тематику, у підготовці лекцій з регіональної та загальноукраїнської історії, а також в їх використанні для висвітлення історії краю в музейній діяльності

Ключові слова: Задніпровські місця; Гетьманщина; козаки; серби; переселенці; фортифікаційні споруди; полк

**Збірник наукових праць
«Соціум. Документ. Комунікація»**

**Том 8, № 3
2023**

(Англійською мовою)

Редагування англomовних текстів:

С. Воровський

Відповідальні редактори:

К. Нікітішина

А. Зленко

Комп'ютерна верстка:

О. Глінченко

Підписано до друку 8 листопада, 2023

Ум. друк. арк. 11,2

Адреса редакції:

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Journal
"Society. Document. Communication"

Volume 8, No. 3
2023

Editing English-Language Texts:
S. Vorovsky

Managing Editors:
K. Nikitishyna
A. Zlenko

Desktop Publishing:
O. Glinchenko

Signed to the print of November 8, 2023
Conventional Printed Sheet 11.2

Editors office address:
Hryhorii Skovoroda University in Pereiaslav
08400, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
E-mail: info@sdj-journal.com.ua
<https://sdj-journal.com.ua/en>