

МІНІСТЕРСТВО ОСВІТИ І НАУКИ УКРАЇНИ

Соціум. Документ. Комунікація

Том 9, № 2

Заснований у 2016 році
Видається чотири рази на рік



Переяслав
2024

Співзасновники:

Університет Григорія Сковороди в Переяславі
ТОВ «Наукові журнали»

Рекомендовано до друку та поширення
через мережу Інтернет Вченою радою
Університету Григорія Сковороди в Переяславі
(протокол № 13 від 28 червня 2024 р.)

Ідентифікатор медіа: R30-04679

(Рішення Національної ради України з питань телебачення
і радіомовлення № 1442, протокол № 14 від 25.04.2024 р.)

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, Національна бібліотека України імені В.І. Вернадського, Dimensions, UCSB Library, University of Oslo Library, University of Hull Library, SOLO – Search Oxford Libraries Online, European University Institute, Cambridge University Library, OUCI (Open Ukrainian Citation Index), WorldCat, CORE

Адреса редакції:

Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
E-mail: info@sdc-journal.com.ua
<https://sdc-journal.com.ua/uk>

MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE

Society. Document. Communication

Volume 9, No. 2

Established in 2016
Issued quarterly



Pereiaslav
2024

Co-founders:

Hryhorii Skovoroda University in Pereiaslav
LLC "Scientific Journals"

Recommended for printing and distribution
via the Internet by the Academic Council
of Hryhorii Skovoroda University in Pereiaslav
(Minutes No. 13 of June 28, 2024)

Media identifier: R30-04679

(Decision of the National Council of Television
and Radio Broadcasting of Ukraine No. 1442, Minutes No. 14 of April 25, 2024)

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") is included in the List of Professional Publications of Ukraine, category "B"

**The journal is presented international scientometric databases, repositories
and scientific systems:**

Google Scholar, Vernadsky National Library of Ukraine, Dimensions,
UCSB Library, University of Oslo Library, University of Hull Library,
SOLO – Search Oxford Libraries Online, European University Institute, Cambridge University Library,
OUCI (Open Ukrainian Citation Index), WorldCat, CORE

Editors office address:

Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
E-mail: info@sdj-journal.com.ua
<https://sdj-journal.com.ua/en>



Редакційна колегія

Vol. 9, No. 2

Головний редактор

Віталій Коцур доктор історичних наук, професор, ректор Університету Григорія Сковороди в Переяславі, Україна

Відповідальний редактор

Алла Зленко кандидат історичних наук, професор, Університет Григорія Сковороди в Переяславі, Україна

Технічний секретар

Оксана Плужник доктор філософії, доцент, Університет Григорія Сковороди в Переяславі, Україна

Національні члени редколегії

Світлана Орлик доктор історичних наук, професор, Центральнуукраїнський національний технічний університет, Україна

Іван Куций доктор історичних наук, доцент, Тернопільський національний педагогічний університет імені Володимира Гнатюка, Україна

Микола Ніколаєв доктор історичних наук, професор, Ізмаїльський державний гуманітарний університет, Україна

Наталя Пасічник доктор історичних наук, професор, Центральнуукраїнський державний університет імені Володимира Винниченка, Україна

Ренат Ріжняк доктор історичних наук, професор, Центральнуукраїнський державний університет імені Володимира Винниченка, Україна

Галина Січкаренко доктор історичних наук, доцент, Національний транспортний університет, Україна

Андрій Бойко-Гагарін доктор історичних наук, доцент, Національна академія керівних кадрів культури і мистецтв, Україна

Олена Ісайкіна кандидат історичних наук, доцент, Національний авіаційний університет, Україна

Юрій Палеха кандидат історичних наук, професор, Національний транспортний університет, Україна

Сергій Кулешов доктор історичних наук, професор, Український науково-дослідний інститут архівної справи та документознавства, Україна

Інна Левченко доктор історичних наук, професор, Університет Григорія Сковороди в Переяславі, Україна

Віктор Коцур доктор історичних наук, професор, Університет Григорія Сковороди в Переяславі, Україна

Олександра Бородієнко доктор педагогічних наук, професор, Інститут вищої освіти Національної академії педагогічних наук України, Україна

Юлія Калужинська кандидат філологічних наук, доцент, Університет Григорія Сковороди в Переяславі, Україна

Олеся Скляренко кандидат філологічних наук, доцент, Університет Григорія Сковороди в Переяславі, Україна

Олексій Гончаренко доктор історичних наук, професор, Університет Григорія Сковороди в Переяславі, Україна

Міжнародні члени редколегії

Ділета Ятаутайте доктор гуманітарних наук, доцент, Литовська військова академія імені генерала Йонаса Жямайтіса, Литва

Володимир Меньшиков доктор соціологічних наук, професор, Даугавпільський університет, Латвія



Editorial Board

Vol. 9, No. 2

Editor-in-Chief

Vitalii Kotsur

Doctor of Historical Sciences, Professor, Rector of Hryhorii Skovoroda University in Pereiaslav, Ukraine

Managing Editor

Alla Zlenko

PhD in Historical Sciences, Professor, Hryhorii Skovoroda University in Pereiaslav, Ukraine

Technical Secretary

Oksana Pluzhnyk

PhD, Associate Professor, Hryhorii Skovoroda University in Pereiaslav, Ukraine

National Members of the Editorial Board

Svitlana Orlyk

Doctor of Historical Sciences, Professor, Central Ukrainian National Technical University, Ukraine

Ivan Kutsyi

Doctor of Historical Sciences, Associate Professor, Ternopil Volodymyr Hnatiuk National Pedagogical University, Ukraine

Mykola Nikolaiev

Doctor of Historical Sciences, Professor, Izmail State University of Humanities, Ukraine

Nataliia Pasichnyk

Doctor of Historical Sciences, Professor, Volodymyr Vynnychenko Central Ukrainian State University, Ukraine

Renat Rizhniak

Doctor of Historical Sciences, Professor, Volodymyr Vynnychenko Central Ukrainian State University, Ukraine

Halyna Sitchkarenko

Doctor of Historical Sciences, Associate Professor, National Transport University, Ukraine

Andrii Boiko-Haharin

Doctor of Historical Sciences, Associate Professor, National Academy of Culture and Arts Management, Ukraine

Olena Isaikina

PhD in Historical Sciences, Associate Professor, National Aviation University, Ukraine

Yurii Palekha

PhD in Historical Sciences, Professor, National Transport University, Ukraine

Serhii Kuleshov

Doctor of Historical Sciences, Professor, Ukrainian Research Institute of Archival Affairs and Documentation, Ukraine

Inna Levchenko

Doctor of Historical Sciences, Professor, Hryhorii Skovoroda University in Pereiaslav, Ukraine

Viktor Kotsur

Doctor of Historical Sciences, Professor, Hryhorii Skovoroda University in Pereiaslav, Ukraine

Oleksandra Borodiienko

Doctor of Pedagogics, Professor, Institute of Higher Education of the National Academy of Educational Sciences of Ukraine, Ukraine

Yulia Kaluzhynska

PhD in Philological Sciences, Associate Professor, Hryhorii Skovoroda University in Pereiaslav, Ukraine

Olesia Skliarenko

PhD in Philological Sciences, Associate Professor, Hryhorii Skovoroda University in Pereiaslav, Ukraine

Oleksii Hontcharenko

Doctor of Historical Sciences, Professor, Hryhorii Skovoroda University in Pereiaslav, Ukraine

International Members of the Editorial Board

Dileta Iataugaite

Doctor of Humanitarian Sciences, Associate Professor, General Jonas Zemaitis Military Academy of Lithuania, Lithuania

Volodymyr Menshykov

Doctor of Sociological Sciences, Professor, Daugavpils University, Latvia



Зміст / Contents

Vol. 9, No. 2

В. Молоткіна, Ю. Молоткіна

Книговидання в Україні в умовах російсько-української війни (2014-2024 рр.): основні тенденції розвитку..... 8

V. Molotkina, Yu. Molotkina

Book publishing in Ukraine in the context of the Russian-Ukrainian war (2014-2024): Main development trends..... 8

М. Таран

Український волонтерський рух та розвиток громадянського суспільства (2014 – лютий 2022).....20

M. Taran

Ukrainian volunteer movement and development of civil society (2014 – February 2022) 20

Л. Божук, Л. Халецька

Події російсько-української війни (2022-2024 рр.):

український і польський досвід документування та репрезентації.....30

L. Bozhuk, L. Khaletska

Events of the Russian-Ukrainian war (2022-2024):

Ukrainian and Polish experience of documentation and representation 30

М. Навальна, А. Зленко, Ю. Калужинська

Вияви лексичних засобів експресивності в масмедійному дискурсі.....43

M. Navalna, A. Zlenko, Yu. Kaluzhynska

Revealing lexical means of expressiveness in mass media discourse 43

В. Савчук

Комунікативні техніки президентів США

як засіб ефективного формування образу лідера нації у соціальній свідомості.....52

V. Savchuk

Communicative techniques of the U.S. presidents

for effective nation leader image formation in social consciousness 52

О. Плужник, О. Хмельницька, Л. Ткаченко, Я. Зленко

Соціальні комунікації як фактор диверсифікації траєкторій гнучкого навчання.....62

O. Pluzhnyk, O. Khmelnytska, L. Tkachenko, Ya. Zlenko

Social communications as a factor of diversification of flexible learning trajectories 62

С. Улько

Підтримка українського книговидання в контексті сучасних соціокультурних викликів 72

S. Ulko

Supporting Ukrainian book publishing in the context of modern socio-cultural challenges.....72

С. Чен, Ш. Ш. Рамасамі, Б. Ше, П. Удомвонг

Розробка нових методів оцінки якості

та ефективності прямих ефірів з використанням цифрових людських технологій.....81

X. Chen, S.S. Ramasamy, B. She, P. Udomwong

Development of new methods for assessing the quality

and effectiveness of live broadcasts using digital human technologies.....81



Book publishing in Ukraine in the context of the Russian-Ukrainian war (2014-2024): Main development trends

Valentyna Molotkina*

Doctor of Historical Sciences, Professor
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<http://orcid.org/0000-0001-6092-5927>

Yuliia Molotkina

PhD in Philological Sciences
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0000-0002-5245-726X>

Abstract. Since 2014, Russia has been conducting a hybrid war against Ukraine, aiming to keep it within its sphere of influence. This aggression encompasses not only military, economic, and diplomatic aspects but also an informational dimension, particularly in the regulation of the book market. Following the full-scale invasion, the protection of the Ukrainian language has become a factor in national security. Beyond market pressure, Russia has waged war on Ukrainian books at a much deeper level: assassinating authors, deliberately destroying libraries, and eradicating Ukrainian literature from occupied territories. Therefore, the development and analysis of the publishing industry are of utmost importance and require in-depth study. This article aimed to investigate the key trends influencing the development of Ukraine's publishing industry between 2014 and 2024. The methodology of the study is based on historical, retrospective, logical, chronological, and analytical research methods. It has been established that a significant achievement in the publishing sector is the shift in readers' preferences towards Ukrainian-language books. As a result, the number of new publications has grown, with trends such as children's educational literature, motivational or business books, and foreign bestsellers emerging. It was found that during the war with Russia and the economic decline in 2014-2015, the book market experienced a downturn. Between 2016 and 2019, some recovery was observed, with a broader genre range and an increased share of Ukrainian-language literature in the market. In 2020, due to the economic crisis caused by the pandemic, the publishing industry faced reductions. By 2021, the decline slowed, and the number of titles increased. After 24 February 2022, publishers and printing houses ceased operations. However, within a few months, most publishers managed to resume work, establish new logistics routes, and secure funding. The findings of this study can be used for further exploration of the scientific issues outlined in the article, as well as serve as a foundation for the development and teaching of relevant courses in higher education institutions

Keywords: publishing activity; publishing sector; book trade; literature; language

Suggested Citation:

Molotkina, V., & Molotkina, Yu. (2024). Book publishing in Ukraine in the context of the Russian-Ukrainian war (2014-2024): Main development trends. *Society. Document. Communication*, 9(2), 8-18. doi: 10.69587/sdc/2.2024.08.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author

Introduction

The analysis of publishing is essential for understanding its current state, examining the evolution of global book market trends, and studying their development in line with a country's socio-economic conditions. Based on the results of an empirical study conducted with eleven German commercial and professional publishers from January to May 2019 using a theoretically developed system of organisational flexibility factors, Z. Velagić (2022) identified areas in which publishers must adapt to a dynamic environment and thus benefit from developing organisational flexibility.

C. Guren *et al.* (2021) investigating the impact of COVID-19 on the publishing sector, concluded that its effects were both subtle and profound. According to the authors' empirical data, most professional publishers achieved significant revenue in 2020, yet sales by category were highly uneven, reflecting short-term societal realities rather than structural changes in the industry. Publishers in the higher education sector, which had faced a prolonged period of decline, experienced a favourable year due to high demand for digital educational content catering to students of various age groups. Academic publishers, whose budgets are adjusted annually rather than monthly, weathered 2020 with minimal impact but expressed concerns about the budgets of their clients for the following year.

Various factors, beyond the perception of cultural and economic value, that influence the selection of books for translation and publication in English were studied by V.M.C. De Capua & P. Henningsgaard (2021). Using a combination of literature review, data collection on the publication of translated books for young readers, and interviews with industry professionals, the authors identified three main factors influencing the selection of books for translation and publication: global language hierarchy, narrative structures, and networks. A. Gudiniavicius & V. Grigas (2022) analysed legal and illegal access to e-books in Lithuanian, a smaller language market, to better understand the digital transformation of books in Lithuania. The researchers found that only 10-25% of legal e-books are available illegally, with the remainder consisting of "self-published" content created by users of illegal websites, primarily through scanning and recognising printed books. They identified four main channels for accessing legal e-books: online bookstores, libraries, subscription platforms, and academic online bookstores. It was determined that the choice of legal e-books available for reading in Lithuanian is limited, while illegal channels offer a wide variety of e-books.

Z. Velagić (2022) focused on the relationships between modern society and publishers, which shape the foundation for the potential of publishing mediation of book content. The study examined the positive and negative implications of IT companies' involvement in book production and distribution, as well as the role of the publisher, who remains the key guarantor of published

content quality. L. Price (2022) explored the theme of the fan writer as a self-publisher, examining changing concepts of authorship, book formats, and literary practices, which are significant for both fan studies and library and information science. Therefore, the issues of developing the publishing industry, examining its current state, identifying the causes of its unsatisfactory condition, and ensuring state support are pressing and require the close attention of researchers.

According to contemporary scholars and bibliologists, the primary challenges of the Ukrainian book market include: difficulties in establishing publishing as a full-fledged business; the need to organise an effective book distribution system; the lack of reliable statistical and analytical data on the market's condition; the necessity to fill all market niches with domestic book products; and ensuring the competitiveness of Ukrainian books and their entry into the global market. Additionally, promoting reading in Ukraine demands particular attention from researchers and professionals. An area ripe for theoretical exploration is the activation of publishers' communication strategies to promote book products among potential readers (Horbenko, 2019). The authors of this article aimed to outline the specific features of Ukrainian publishing under the conditions of the Russian Federation's military aggression and identify the key trends influencing the development of publishing in Ukraine during the period from 2014 to 2024. To achieve this goal, the following objectives were set: to provide a systematic overview of Ukrainian publishing; to illustrate the formation of an independent and viable Ukrainian book market; and to identify the communication challenges faced by Ukrainian publishers at this stage of publishing development.

Literature Review

The publishing activities in Ukraine have been the subject of research by numerous scholars and practitioners in the fields of publishing and library science. The monograph edited by H.V. Horbenko (2019) was devoted to the publishing industry in Ukraine, focusing on relevant and potential innovative development paths for publishing companies, insights from the startup industry, innovations in book design and artistic decoration, the introduction of new publishing trends (e.g., inclusive literature), and the growth of consistently demanded and profitable sectors such as children's books and educational literature. Contemporary trends in Ukrainian publishing, including its general characteristics, quantitative and qualitative indicators, output volumes, linguistic and territorial characteristics, were examined in the works of S. Buryak (2021), M. Senchenko & S. Buryak (2021), and A. Vorontsova & H. Cherniak (2022). External factors influencing the state of Ukrainian publishing and quantitative modelling of publishing characteristics in Ukraine from 1991 to 2017 have been studied in depth

(Horobets, 2018), along with the dynamics of Ukrainian publishing between 2015 and 2018 (Skrypchuk, 2019). T. Yezhyzhanska (2023), who traced the dynamics of the Ukrainian book market under systemic crisis conditions, concluded that the crisis caused by the pandemic, lockdowns, and large-scale war affected both major and small-scale producers in the industry. The study of Ukrainian publishers during crises sheds light on the communication challenges they face and highlights the anti-crisis communication strategies that can be employed to overcome the crisis and ensure effective operations.

S. Hirik (2022), in their research, examined the overall situation in Ukrainian publishing since the country's independence. Researchers agree that new offerings from publishers and the patriotic upsurge amidst the hybrid war have revitalised the Ukrainian book market. The thematic and genre diversity of domestic books has expanded, the share of Ukrainian-language literature on the market has increased, and the number of translated books has grown. However, given the low purchasing power of the population, expecting a breakthrough remains unrealistic. O. Sukhorukova (2016), investigating the issue of the competitiveness of the publishing sector in the global market and identifying negative trends in the development of Ukrainian publishing, concluded that the main vectors of publishing development in developed countries are as follows: slowing growth rates in the volume of printed products; the creation of a multi-tier competitive structure within the industry; the expansion of international media associations; and the introduction of comprehensive organisational, technological, and product innovations.

In Ukraine, publishing associations are absent, and the publishing sector consists solely of medium and small business entities. Ukrainian publishing companies are actively working in specific thematic segments of the book publishing market and implementing projects related to the use of informational resources. Several works by domestic scholars are devoted to the economic challenges of the publishing industry in Ukraine. For instance, Ya. Kotliarevskiy *et al.* (2017) systematised and analysed information regarding state support for the publishing industry in Ukraine and the EU, highlighting issues associated with the introduction of a new mechanism for oversight and control over state subsidies for economic entities that arose from changes in national legislation. However, the issue of the current state of publishing and its development trends amidst the Russian-Ukrainian war has not yet received adequate attention in modern scientific discourse.

Materials and Methods

Statistical data on the production of printed materials were sourced from the scientific-practical journal *Bulletin of the Book Chamber* (Onyshchuk & Tatarinova, 2021; Vorontsova & Cherniak, 2022), which is published systematically to inform the public about aspects of the

development of the domestic publishing industry. Analytics on global and Ukrainian publishing, book market reviews, and international practices in this field are presented on the website of the cultural and publishing project *Chytomo* (Zahorui & Khmelovska, 2022). The research employed general scientific, interdisciplinary, general historical, and specialised methods. Specifically, historical and logical methods facilitated the identification of development processes in Ukrainian publishing, the interrelation of socio-political events, and the necessity of their study in specific historical contexts. Comparative-historical and chronological methods were used to reconstruct the history of publishing development, the establishment and evolution of the legal framework, among others. Additionally, the comparative-historical method was utilised to identify similarities and differences among publishers with various ownership forms. This method enables the determination of the main directions, forms, and methods of publishers' activities at different stages of their development. Analytical methods allowed for the identification of certain patterns in publishers' operations. The critical-constructive method was applied to analyse modern interpretations of the interaction between publishing and political realities.

Using causal analysis methods, the study identified the dependence of the state of domestic publishing on the influence of internal and external factors, societal democratisation, and global processes. The descriptive method was applied to define the specific features of publishing processes. The statistical method was employed to account for quantitative indicators of publishing production and product sales in both quantitative and qualitative dimensions, as well as in thematic and linguistic aspects. The study of book repertoires was also supported by typological and thematic-problem methods. The problem-chronological method not only determined the technological aspects of the research but also shaped its structure, enabling the delineation of components, each examined in chronological order and its inherent dynamics. This method revealed the key patterns of publishing network development across various periods, considering content changes and thematic issues in their dialectical interconnection. Theoretical generalisation of the interaction between the whole and its parts, such as organisational and structural aspects of publishing, was also undertaken.

The historical and retrospective methods played a significant role, allowing a gradual transition from the present to the past to identify the most characteristic features, trends, and patterns in the publishing sector's development. The study also applied methods of source and quantitative analysis (to examine quantitative indicators of various types and significance), which enabled a comprehensive elucidation of the research problem to achieve the set objectives. The integration of these research methods helped avoid subjective perspectives, ensured scientific reliability in the findings, and facilitated

a logical and consistent presentation of the material, leading to a more profound reconstruction of the essence of historical processes.

■ Results and Discussion

Reconsideration of humanitarian policy principles in publishing

Since 2014, Ukraine has been revising its humanitarian policy foundations, particularly intensifying efforts to regulate the book market. Prior to 2013, the Ukrainian book market was predominantly oriented toward selling products imported from Russia. According to the Ukrainian Publishers and Booksellers Association, Russian books constituted 73-75% of the market, whereas Ukrainian publications accounted for only 20-23% at that time (De-occupation of the Book Market..., 2023). Data from the Ukrainian Book Chamber reveals that books vital to Ukraine's cultural and informational space were mostly printed in micro-runs, rarely exceeding 1,000 copies, typically ranging between 300-500. As a result, they wielded minimal influence on public opinion and functioned weakly as a social institution, exacerbated by the lack of proper promotion (Kuzmuk, 2016). This situation affected both Ukrainian publishers and readers, who had to settle for a limited selection of Ukrainian-language books, posing a threat to Ukraine's national interests (Skrypchuk, 2019).

During 2014-2015, negative trends in Ukraine's book market persisted and even worsened due to the war with Russia. The number of published books nearly halved, and the number of retail outlets also declined. Key factors deteriorating the market included inflation and a 25.4% drop in Ukrainians' purchasing power (Sukhorukova, 2016). Publishing volumes fell to 2009-2010 levels, with 21,796 titles totalling 55 million copies in 2014, and 19,958 titles totalling 36 million copies in 2015 – this being the lowest overall print volume since 2000 (Hirik, 2022). Simultaneously, societal processes during 2014-2015 fostered Ukrainian self-identity, state-building, and the need to protect both territory and informational products (Yezhyzhanska, 2023). The patriotic sentiment boosted demand for Ukrainian-language books, a segment that has since shown stable growth. Ukrainian publishers strengthened their market position through active promotion of new publications, primarily via bookstore networks and book fairs. This led to an increase in the proportion of books purchased in organised retail channels, with a corresponding decline in those bought at markets or informal stalls. This trend was partly due to reduced imports of Russian books. In 2015, the value of Russian book imports was nearly \$3.7 million, compared to \$23 million in 2013. However, these official figures exclude the shadow market, which remained significant (Skrypchuk, 2019). The content of Russian books infiltrating the Ukrainian market raised significant concerns for humanitarian security. Among them were examples of anti-Ukrainian propaganda that

distorted history, called for the destruction of Ukrainian statehood, and portrayed resistance against Ukraine in a positive light. This necessitated the urgent implementation of legal and other mechanisms to prevent the dissemination of such books in Ukraine (Horbenko, 2019). This restriction did not apply to Russian-language books published in Ukraine. Consequently, the ban failed to achieve the desired results, although it did complicate logistics and supply chains for Russian publishers (De-occupation of the Book Market..., 2023). Legislation led to Russian books entering the Ukrainian market primarily through smuggling (Horbenko, 2019).

By 2016, Ukraine's book market began showing signs of revival, with an expanding range of Ukrainian-language printed products. In 2016, the volume of book production reached 21,330 titles with a total circulation of 49 million copies (Hirik, 2022), equating to slightly more than one book per capita. By contrast, EU countries publish 6-8 books per capita annually. Approximately 70% of all books published in Ukraine were in Ukrainian, while Russian-language publications decreased by 54%. These trends have continued. Entire segments that previously did not exist in Ukrainian publishing – such as business, motivational, popular science, science fiction, fantasy, comics, and graphic novels – emerged (Horobets, 2018). Ukrainian publishers refined their marketing strategies, driving qualitative changes in the book market structure. One key development was the rise of Ukrainian non-fiction, including popular science literature addressing contemporary issues. Another significant shift was the growth of translated literature, which nearly doubled between 2015 and 2017 in both titles and print runs. This "boom" in translated literature and non-fiction was primarily attributed to the reduction of Russian imports and changing reader preferences, with an increased interest in Western and global cultural contexts and technologies. Publishers responded to these shifts (Skrypchuk, 2019).

Popular non-fiction works by foreign authors, business literature, and translations of global bestsellers gained the most traction in Ukraine. In 2017, for instance, Nash Format published 22,500 copies of Ayn Rand's "Atlas Shrugged" trilogy. E.L. James's "Fifty Shades of Grey" trilogy also achieved immense popularity, although print figures remain unknown. These trends were influenced not only by authorship but also by reading formats – traditional, electronic, and audio (Horobets, 2018). In addition to producing new books – including works by emerging Ukrainian authors and translations of modern literary bestsellers – publishers began reprinting classic literature (Orlova, 2019). Some publishers sought to define distinct niches. For example, Balance Business Books specialises in quality business literature, Nash Format combines business and fiction, Fontan Kazok focuses on children's books, while ArtHuss and Rodovid produce popular art publications. However, most Ukrainian publishers remain generalists.

Notably, Ukraine lacks publishers exclusively dedicated to niches like gastronomic literature. Efforts are also underway to fill gaps in young adult literature, predominantly by translating global bestsellers. Overall, the Ukrainian book market remains insufficiently structured by themes (Horbenko, 2019).

The issue of regulating the illicit distribution of printed materials in Ukraine from Russia continues to be a pertinent concern. Since March 2018, a practice has been implemented in Ukraine involving the confiscation of unauthorised publications and the imposition of fines on book smugglers and distributors. In 2018, 27 violation reports were issued for breaches of the rules on distributing publishing products, resulting in fines totalling UAH 1,005.210. However, it must be acknowledged that efforts to formalise the book market were largely ineffective. These measures were primarily relevant in regions of Ukraine with higher proportions of Russian-speaking populations and a correspondingly higher demand for Russian-language books – namely, in the eastern and southern parts of the country (Skrypchuk, 2019). On the other hand, Russian publishers adapted to the new circumstances by actively establishing subsidiary companies in Ukraine. Prepress work was carried out in Russia, while the Ukrainian subsidiaries acquired the printing rights and effectively operated as printing facilities, publishing books through specially registered local branches. This arrangement allowed Russia to remain the primary beneficiary of profits while incurring lower costs for its part of the process. Through this mechanism, Russian entities continued their ideological expansion and maintained a strong presence in Ukraine's book market. Subsidiaries of major Russian publishing houses, such as *Eksmo*, *Azbuka-Attikus*, and *Alpina Publisher*, operated successfully in Ukraine for an extended period (De-occupation of the book market..., 2023).

Access to products from Ukrainian publishers in the regions remains problematic. The only comprehensive bookstore chain, *Knyharnya Ye*, operated exclusively in cities such as Kyiv, Kharkiv, Lviv, Ivano-Frankivsk, Vinnytsia, Lutsk, Volodymyr-Volynskyi, Ternopil, Dnipro, Rivne, Khmelnytskyi, and Sumy. This meant that not all regional centres were covered by this network, let alone smaller towns or villages, where access to books was available primarily through online platforms and postal services. These distribution channels not only made books more accessible but also helped save costs for buyers due to lower prices (Horbenko, 2019). In Ukraine's book industry, online platforms have emerged as a response to the digital economy. Major platforms such as Yakaboo, Bookzone, Kniging, and Buklya provide better accessibility to printed books for Ukrainian consumers. Through flexible pricing policies, dynamic updates to catalogues, easy product searches, and efficient delivery systems, this segment of book sales continues to grow. For instance, Ukraine's largest online bookstore, Yakaboo.ua, guarantees free delivery of selected books to

any branch of the Ukrposhta postal network chosen by the customer (Horobets, 2018).

Researchers recognise book fairs as the primary promotional tool for books in Ukraine. These events combine vibrant marketing efforts with moderate pricing strategies. The largest fairs, such as the Book Arsenal in Kyiv (held in spring) and the Publishers' Forum in Lviv (held in September), are the most significant cultural events in the country, showcasing almost the entire range of books published in Ukraine. Smaller sales exhibitions in Dnipro, Zaporizhzhia, and Cherkasy also play their part. If in 2017 the volume of publishing output reached 22,047 titles with a total circulation of 45 million copies, in 2018 it increased to 22,612 titles with a circulation of 47 million copies, and by 2019, it rose to 24,416 titles with a circulation of 61 million – figures comparable to the record levels of 2012 (Hirik, 2022). Ukrainian publishing is becoming increasingly visible globally. In 2019, a Ukrainian book was recognised as one of the best inclusive children's books in the world, while the *Mystetskyi Arsenal* received the International Excellence Award in the Literary Festival category at the 48th London Book Fair (Orlova, 2019). Overall, the years 2016–2019, spanning the period after the first active phase of the Russian-Ukrainian war and before the COVID-19 pandemic, can be considered the most successful for domestic publishing (Onyshchuk & Tatarinova, 2021). However, the economic crisis caused by the pandemic and quarantine restrictions negatively impacted the development of Ukraine's book market.

Challenges for book publishing during the COVID-19 pandemic

The pandemic led to the closure of bookstores, halts in the operations of publishing houses, and interruptions in printing services. In 2020, 343 publishing houses and 48 bookstores in Ukraine were forced to cease operations (Konstantinova, 2021). The crisis resulted in a decline in book production to 18,967 titles with a total circulation of 42 million copies. This figure represents the lowest number of titles since 2008, though the decline in circulation did not reach the critical levels observed in 2015. According to the Ukrainian Association of Publishers and Booksellers, compared to 2019, the volume of production by title decreased by 23%, and total circulation dropped by 34% (De-occupation of the book market..., 2023). Despite the reduced output of books during quarantine, an increasing number of consumers began purchasing and reading books. While in 2014, the share of book buyers was 31%, it doubled to 62% in the first months of 2020. The proportion of consumers purchasing printed books rose from 30% in 2014 to 59% in 2020, while the share of electronic book buyers increased from 3% to 51% (Yezhyzhanska, 2023).

In 2020, priority was given to educational, scientific, and literary works. Among thematic categories, socially significant publications dominated the total output of

printed editions. Educational and methodological literature led in both the number of titles and circulation, accounting for 3,843 printed items with a circulation of 12,267.3 thousand copies, representing 27.7% of all titles and 60.7% of the total circulation. Compared to 2019, the number of educational publications decreased by 2,560 titles (40%), and the circulation declined by 17,877.4 thousand copies (59.3%) (Buryak, 2021; Senchenko & Buryak, 2021).

Books and brochures in Ukrainian totalled 10,604 titles with a circulation of 16,671.5 thousand copies, which constituted 76.5% of all titles and 82.5% of the total circulation. Compared to the previous year, the number of Ukrainian-language titles fell by 4,199 (28.4%), and circulation decreased by 26,120.5 thousand copies (61%). Russian-language publications amounted to 1,724 titles with a circulation of 1,814.1 thousand copies, representing 12.4% of titles and 9.0% of total circulation. Compared to 2019, Russian-language titles decreased by 1,126 (39.5%), and circulation dropped by 2,646.8 thousand copies (59.3%) (Buryak, 2021). In 2021, the rate of decline slowed, and the industry began to recover: "The market revived, the assortment expanded, and the number of titles increased" (Yezhyzhanska, 2023). Educational, scientific, and literary works remained predominant in the book stream. Among thematic categories, socially significant publications continued to lead. Educational and methodological literature accounted for 6,573 printed items with a circulation of 31,639.6 thousand copies, representing 31.2% of all titles and 71.4% of the total circulation. Compared to 2020, the number of titles grew by 520 (8.6%), and circulation increased by 3,137.9 thousand copies (11%).

Books in Ukrainian comprised 2,288 titles with a circulation of 4,504.3 thousand copies, making up 81.3% of all titles and 86.4% of total circulation. Russian-language publications included 449 titles with a circulation of 564.6 thousand copies, constituting 16.0% of titles and 10.8% of total circulation (Vorontsova & Cherniak, 2022). The implementation of the "eSupport" state programme at the end of 2021 significantly boosted the book market dynamics, tripling activity compared to the same period the previous year, as consumers actively spent their so-called "COVID thousand" on books. Over two months, the programme generated UAH 1.2 billion in sales for Ukrainian bookstores and publishers (pre-pandemic, the entire market was valued at UAH 2.5 billion) (Melnik, 2022). This provided substantial support to the publishing sector, which, after months of operating under quarantine restrictions, experienced a surge in customer activity (ICIP: Ukrainians spent a billion hryvnias..., n.d.). According to the director of the Ukrainian Book Institute, "Without this support, retail sales would have nearly halved" (Koval, 2023). The primary challenge for publishers was meeting the enormous demand from consumers: the "eSupport" programme increased sales three- to fivefold, creating an atypical situation where

books became scarce. Publishers were unprepared for the surge, struggling to handle the excessive volume of orders (Morozov, 2022). This programme provided a strong impetus for industry development and allowed many publishers to settle debts and plan for the future. However, the full-scale Russian invasion on 24 February 2022 shattered all plans, disrupting the industry's progress and undermining the recovery achieved during the previous year.

The functioning of the book publishing industry after a full-scale invasion

At the beginning of the full-scale invasion, the printing houses stopped working completely, and the production and shipment of finished products ceased. It was dangerous not only to produce books but also to transport them. At the beginning of the invasion, the Kharkiv publishing houses Vivat and Folio lost not only their offices and some of their employees, who were evacuated to other places, but also their printing houses (Lysenko, 2023). The question of the protection of Ukrainian book publishing has become more acute than ever. It has also become a national security factor. In addition to market pressure, the Russians began to wage a war against Ukrainian books on a completely different level: killing authors, deliberately destroying libraries, and eradicating Ukrainian literature from the occupied territories (De-occupation of the book market..., 2023). By mid-April, 22% of Ukrainian publishing houses (ASAA, BOOKSHA, Blym-Blym, Vihola, Vydavnytstvo Zhupanskoho, Zhorzh, 4mamas, Molfar, Parasolia, PEGAS, Ranok, Tezy, Folio, Chas Maistriv, Osnova Group, and others) had been damaged as a result of the hostilities. Most of the damaged buildings were located in Kharkiv. The Blim-Blim, KLO, and YIZHAK publishing houses were practically unable to operate due to the constant shelling. Abrykos, BOOKSHA, 4mamas, Oleksandr Savchuk Publisher, DIPa, Mamino, Smoloskyp, and the Osnova Group ceased operations (Survey: Offices and warehouses..., 2022). At the beginning of June 2022, only 39% of publishing houses were operating, and 22% had partially or completely destroyed warehouses and offices (Cherkasets, 2022).

However, most publishing houses were able to resume operations and secure their employees, solve problems with paper supplies, move warehouses away from the combat zone, establish other logistical routes, and find funding for these processes (Yezhyzhanska, 2023). In particular, large publishing houses such as Lviv's Vydavnytstvo Staroho Leva or Kharkiv's Folio and Vivat were able to resume operations in April 2022, a month and a half after the start of the invasion. Due to the shutdown of the Kharkiv (Unisoft and Globus) and Kyiv (Konvi) printing houses at the beginning of the full-scale invasion, Kyiv's Vydavnytstvo Laboratoria was only able to release its first books in August. Kharkiv's Unisoft printing house resumed full operations in June 2022. Smaller

publishers: Motornyi Ravlyk and Parasolka also resumed operations in the summer of 2022 (Lysenko, 2023). Abuk, Bilka, Bukrek, Vydavnytstvo Anetty Antonenko, Vydavnytstvo Bukrain, Vydavnytstvo Staroho Leva, Kalamar, Knigolav, Kompas, Nash Format, Choven, Rodovid, and Yakaboo Publishing continue to operate fully (Survey: Offices and warehouses..., 2022). By mid-2022, both large and small publishers were printing books. But for a while, printing facilities from Kharkiv and Kyiv moved to the west. Publishers began to print books in printing houses in Drohobych (Kolo printing house) and Kamianets-Podilskyi (Ruta printing house) (Lysenko, 2023). By 14 June 2022, the number of books published in Ukraine had decreased by 52% compared to the same period of the previous year. However, the share of Ukrainian-language books and brochures increased by 15%. In 2021 the share of Ukrainian-language publications was 79%, and in 2022 it was 94% (Melnyk, 2022).

According to the Book Chamber, 9,691 titles of books and brochures were published in Ukraine in 2022, with a circulation of 11 million 704.2 copies, which is 2-4 times less than in previous years (Semeniuta, 2023). Of all books published in the country in 2022, 82% were in Ukrainian – 7,147 titles. This is 54% less than in 2021. The circulation of Ukrainian-language books decreased by 38%. In 2022, 714 books in Russian were published in Ukraine, 32% less than in 2021. In other languages, 855 books were published, almost half as many as in 2021, with circulation falling by 19% (Melnyk, 2023). As for retail book sales, in the first few months of the full-scale invasion, sales plummeted (almost to zero). In particular, Yakaboo, the largest book retailer, did not sell a single paper book in March, only e-books, as logistics were blocked and the warehouse was under fire since 24 February; by 15 April they sold 57,500 books, and in May – almost 84,000 books (Melnyk, 2022). Vydavnytstvo Zhupanskoho, Nora-Druk, Rodovid, Komora, and others have partially resumed sales, and publishers such as A-BA-BA-HA-LA-MA-GA, Vydavnytstvo Anetty Antonenkoe, Smoloskyp, Yakaboo Publishing, and others have even increased sales (Zahorui & Khmelovska, 2022; Yezhyzhanska, 2023). The price of a book has roughly doubled due to the increase in the price and shortage of paper, complicated logistics, and the rising cost of printing services (Kruhlov, 2022).

By the end of 2022, most publishers observed a gradual increase in interest in reading (Yezhyzhanska, 2023). The domestic book market experienced a revival driven by readers' widespread rejection of Russian-language literature and a growing interest in works by Ukrainian authors. According to the State Committee for Television and Radio Broadcasting, 178 business entities and individual entrepreneurs expressed interest in engaging in publishing and book distribution in Ukraine in 2022 (The number of Russian-language books published in Ukraine decreased by almost 60%..., 2022). Furthermore, Ukrainian publishers expanded to international markets, active-

ly participating in global events, seeking new partners, selling rights, and presenting books in foreign bookstores (Zahorui & Khmelovska, 2022). Foreign partners have also supported Ukrainian publishers, purchasing rights and books, organising printing, and distributing products from Ukrainian publishers. In some instances, foreign partners raised funds and provided grants to assist publishers. For example, the Warsaw-based Universal Reading Foundation allocated \$150,000 among 51 publishing houses. Additionally, 20 publishers received €30,000 each from the German Publishers and Booksellers Association. These programmes were actively facilitated by the Ukrainian Publishers and Booksellers Association in collaboration with the Ukrainian Book Institute. However, the Ukrainian publishing industry still lacks a unified strategy for recovery (Cherkasets, 2022).

While publishers experienced a degree of recovery, printing houses continued to face the aftermath of destruction, staff evacuations, and winter power outages. Paper books were released with delays from their scheduled sale dates. The most severely affected were large printing facilities, predominantly located in the Kharkiv region. Publishers formed queues at printing houses to complete their planned releases (Lysenko, 2023). Sustaining the publishing industry during the war, as with the entertainment industry as a whole, has been challenging without state support. The development of the book market requires effective advertising, promotion of new releases, and public outreach. The mission of promoting reading within the country must be undertaken not only by publishers but also by state institutions and civil society organisations. Quota systems and temporary subsidies proved insufficient to protect Ukrainian publishers. More systematic and decisive measures were needed to limit the aggressor state's access to the Ukrainian market. Consequently, several legislative initiatives were introduced to stimulate the publishing industry and completely ban Russian imports (De-occupation of the book market..., 2023).

The Verkhovna Rada passed Law of Ukraine No. 2313-IX "On Amendments to Certain Laws of Ukraine Concerning the Stimulation of Domestic Publishing and Book Distribution Development" (2022). This law aimed to support book distributors by reimbursing the cost of real estate rental for premises used as specialised bookstores (The Book Chamber of Ukraine: in 2023, more than 90% of publications were printed in Ukrainian, 2023; Yarema, 2023). However, the law requiring the state to reimburse bookstore rental costs and provide annual book purchase certificates to Ukrainian citizens was signed by the President but was not funded and therefore remains non-operational (The UIK's position on the provision of certificates and subsidies has been clarified. Ukrainian Book Institute, 2023). Additionally, the Verkhovna Rada adopted another "book law", Law of Ukraine No. 2309-IX "On Amendments to Certain Laws of Ukraine on Establishing Restrictions on the

Import and Distribution of Publishing Products Relating to the Aggressor State, the Republic of Belarus and the Temporarily Occupied Territories of Ukraine" (2022). The goal of this legislation is to reduce the volume of Russian-language literature on the Ukrainian market and eliminate a powerful competitor to Ukrainian publishers. The Russian book market, traditionally supported by private funds and state budget allocations, has long been a tool for spreading Russian cultural influence (Zelenchuk, 2023).

The law awaited the President's signature for almost a year and, thanks to efforts by the publishing community and stakeholders, finally came into effect on 25 June 2023 (De-occupation of the book market. How Russian publishers are still making money in Ukraine, 2023). However, the 2023 state budget did not allocate funds for implementing plans to provide reading certificates or subsidies to bookstores (The UIK's position on the provision of certificates and subsidies has been clarified, 2023). On 11 January 2023, the Ukrainian Book Institute publicly announced its inability to implement programmes for bookstore subsidies and book vouchers due to a lack of funding. Nonetheless, on 3 March 2023, the Cabinet of Ministers of Ukraine approved the "Reading as a Life Strategy" strategy, set to run until 2032. This strategy optimistically aims to increase the number of books per capita, expand the network of bookstores, update library collections, and engage more children in reading. On 12 September 2023, the Ukrainian Book Institute published an appeal on its website requesting the Ukrainian government to ensure funding for the Institute's activities in 2024. The appeal emphasised that the Institute had not received financing for implementing the primary priorities outlined in the Reading Development Strategy for 2032 (Zelenchuk, 2023).

This is not the first attempt to declare state support for Ukraine's publishing sector; there have been others, but progress has rarely gone beyond strategy adoption, with laws providing only partial protection for the Ukrainian market. Understandably, during wartime, increasing publishing output and expanding reading opportunities for the population are not high funding priorities. However, this raises the question of whether it is appropriate for state authorities to regularly adopt regulatory acts that require significant public funds for implementation. Under such circumstances, publishers must rely on their own resources and skills to promote their books to readers and popularise reading in general (Yezhyzhanska, 2023). The Ukrainian Book Institute has also intensified its efforts, including initiatives to replace Soviet-era Russian-language library collections with new publications (Lysenko, 2023). Additionally, the surge in national consciousness driven by the large-scale Russian aggression has contributed to "cleansing" the publishing sector: libraries increasingly removed Russian books from their collections, bookstores withdrew them from their shelves, and municipal services

assisted readers in discarding such books from their home libraries. Demand for works by Ukrainian authors has risen, with many people choosing not to read in Russian or buy books published by the aggressor state as a matter of principle. Bookstore chains independently decided to stop selling Russian-made literature.

According to the State Committee for Television and Radio Broadcasting, the number of registered publishers has also increased. In 2023, 302 publishing entities were added to the State Register of Publishers, Producers, and Distributors of Publishing Products, including 270 new ones. Additionally, 32 players in the publishing market renewed their certificates. In contrast, 293 publishers were registered in 2021, and only 152 in 2022. In 2023, five certificates were revoked due to the termination of publishers' activities (Yarema, 2023). According to O. Koval (2023), there were 560 publishers in Ukraine in 2023, but only around 250 were active. Furthermore, there are approximately 130 bookstores in the country. Ukrainian publishers are actively adapting to changes, implementing modern technologies, experimenting with presentation methods, and exploring new ways to engage consumers. The number of new publishers is also growing, bringing freshness and innovation to the industry. These new players often specialise in niche topics, experimenting with formats and sales methods, helping to diversify the market and expand readers' options. According to the Book Chamber of Ukraine, more than 6.5 million copies of books and brochures were printed in 2023, most of which were in Ukrainian (The Book Chamber of Ukraine: in 2023, more than 90% of publications were printed in Ukrainian, 2023). Compared to the previous year, book publishing in Ukraine increased by 73% in the number of titles (printed units) and by 203% in circulation (Yarema, 2023).

Foreign literature remains the most popular, accounting for over 80% of sales, as noted by Oleksandr Krasovytsky, Director General of Folio Publishing House. However, works by Ukrainian authors are also gaining popularity. Besides classics, readers are increasingly interested in contemporary writers. According to the Ukrainian Book Institute, the most popular book in 2023 was "I See You're Interested in Darkness" by Ilarion Pavlyuk, translated from Russian by Viktoriya Stakh and published by Vydavnytstvo Staroho Leva. It attracted attention from both Kyiv bookstores and nationwide platforms. Other popular titles included "The Ladder" by Eugenia Kuznetsova (Vydavnytstvo Staroho Leva), "New Dark Ages: Colony" by Max Kidruk (Borodaty Tamarin), and "Dances with Bones" by Andriy Semianikov (Vikhola). According to the Ukrainian Book Institute, not only prose but also poetry, popular science publications, and journalism enjoyed considerable popularity (Book Publishing in Ukraine: Definition and Prospects, 2024). Consumers of books tend to rally around publishing brands and show support for their favourite authors and publishers (Yezhyzhanska, 2023).

The current state of Ukrainian publishing is dynamic and evolving. The publishing sector is undergoing a period of transformation and adaptation to new conditions, including digitalisation and changing reader preferences. As of February 2024, the Ukrainian Book Institute reported that the book market included approximately 300 publishers represented in book trade, around 600 retail sellers (bookstores and kiosks), approximately 50 online sellers, and an annual market volume of ~2-3 billion UAH.

This study addresses the issue of disseminating and accessing quality cultural content in Ukraine's market, the prospects for developing a publishing strategy based on works that meet the needs of a wide readership (thus ensuring publisher profitability without increasing printing costs), and the potential for providing a significant contribution to Ukraine's cultural and informational landscape. Further research is needed on the functioning of the publishing sector during crises, a topic explored by T. Yezhyzhanska (2023), who examined the dynamics of the Ukrainian book market during challenging times and the communication difficulties publishers face during critical periods. The researcher argues that crises have become a common phenomenon in modern society, triggered by various destructive factors such as political and economic instability, the COVID-19 pandemic, and Russia's full-scale war against Ukraine. Over recent years, the country's publishing industry has faced multiple crises: economic challenges, a reading crisis, the pandemic, and war. For the domestic book market, these challenges have significant and systemic consequences, pushing publishers to the brink of survival.

The issue of counterfeit product distribution remains contentious. As O. Horobets (2018) aptly notes, book piracy – namely, the free downloading of unlicensed versions of printed materials – has become widespread due to the population's low purchasing power and the rapid development of electronic technologies. In a market economy, all work, including creative authorship, should be remunerated. However, amid unstable state policies on copyright and an uncontrolled internet environment, an increasing number of readers turn to such "libraries". This trend, in turn, reduces sales not only in traditional bookstores but also in online shops. In addition to piracy, the researcher highlights several factors that directly impact sales, both in Ukraine and globally, including: the economic situation at macro and micro levels, government policies, innovative technologies, consumer purchasing power, market trends, and alternative content sources.

H. Skrypchuk (2019), in analysing the development of publishing in Ukraine during the years of independence, also draws attention to the market for electronic books (including audiobooks), which is a particularly problematic segment of the Ukrainian book market. According to the researcher, the spread of internet piracy – where free content is readily available – dissuades Ukrainian publishers from offering electronic versions of books. While agreeing with the author's conclusions, it is worth

emphasising that piracy and the lack of a culture of paying for digital content have not only technological but also social roots. These include: the general economic crisis, which has led to a decline in the population's purchasing power; the extraordinarily high production costs for domestic publishing, rendering it uncompetitive and limiting print runs and the range of publications; the absence of a nationwide book distribution network; reductions in and insufficient funding for libraries; a decline in the number of bookstores across administrative and territorial units; high postal and transportation costs; unreasonably high utility and rental payments; minimal foreign investment in the publishing sector; the underdevelopment of the domestic internet market for selling publishing products; and the lack of comprehensive informational support for bringing Ukrainian books to the domestic market. These issues collectively hinder the growth and sustainability of Ukraine's publishing industry, exacerbating existing challenges in adapting to modern market demands.

Conclusions

The war with Russia and the economic downturn in 2014-2015 led to a contraction of the book market in Ukraine. However, from 2016 to 2020, there was a notable revival. The share of literature published in Ukrainian increased, and the thematic and genre diversity of Ukrainian books expanded. Restrictions on imports significantly reduced the volume of Russian-language literature, and the Ukrainian book market ceased to operate as an extension of the Russian market. This shift was not only the result of sanctions imposed on certain Russian publications but also reflected a change in readers' perspectives. In response, many publishers began placing greater emphasis on print quality, translations, and collaboration with domestic authors. Consequently, the number of new publications in Ukraine increased, and translation projects emerged more rapidly. Ukrainian publishers began filling market niches with high-quality products offered at affordable prices. New trends emerged in the book market, including children's educational literature, non-fiction, motivational and business literature, and foreign bestsellers. Additionally, there was an increase in events and activities in the publishing sector, such as literary festivals, book exhibitions, fairs, book presentations, author meet-and-greets, and autograph sessions.

In response to the demands of discerning readers, publishers improved the quality of their books. They took more risks and paid greater attention to visual content, with a particular focus on creative design and illustrations in children's literature. The publishing market saw the emergence of new players who combined publishing with art, bringing fresh perspectives to the industry. For the first time since Ukraine's independence, Ukrainian publishers became market leaders. The volume of book publishing in 2019 was nearly a record high for the industry. However, the economic crisis caused by the

pandemic, quarantine restrictions, prolonged bookstore closures, and months of remote work negatively impacted the development of the Ukrainian book market, leading to a decline in publishing. In 2021, the rate of decline slowed, the range of available books expanded, and the number of titles increased. The challenges brought about by the full-scale war affected every publishing house. Printing operations ceased, production halted, and the distribution of finished products was disrupted. Nevertheless, most publishers managed to resume operations, ensure the safety of their employees, address paper shortages, relocate warehouses to safe locations, restore logistics, and secure funding for these processes. Moreover, new publishing houses emerged, new books were released, and various online and offline events, attracting thousands of participants, were organised. The widespread rejection of Russian-language books and the growing interest in works by Ukrainian authors contributed to the revitalisation of the domestic book market.

To ensure the growth of book publishing and distribution and to produce competitive products for

the market, as revealed by this study, it is essential to adjust state policy in this area. This includes updating the legal framework of the sector to address contemporary challenges, taking measures to combat online piracy that threatens the country's informational security, increasing funding for central book institutions, and creating and promoting programmes to popularise reading among the population. Further studies should analyse the impact of external factors on book publishing in Ukraine, examine the material and technical conditions of publishing houses, and assess the professional and staffing capacity of the industry. These aspects serve as a basis for continued investigation into the issue.

■ Acknowledgements

Sincere gratitude is extended to the Hryhorii Skovoroda University in Pereiaslav for providing access to the Scopus and Web of Science scientometric databases.

■ Conflict of Interest

None.

■ References

- [1] Book publishing in Ukraine: Definition and prospects. (2024). Retrieved from <https://mcip.gov.ua/news/ukrayinske-knygovydannya-tendenciyi-ta-perspektyvy-rozvytku-galuzi/>.
- [2] Buryak, S. (2021). Book publishing activity of modern Ukraine: State, trends and prospects of development. *Bulletin of the Book Chamber*, 1, 10-21. doi: 10.36273/2076-9555.2021.1(294).10-21.
- [3] Cherkasets, O. (2022). *Book publishing in Ukraine decreased by 60%*. Retrieved from <https://umoloda.kyiv.ua/number/0/164/167196>.
- [4] De Capua, V.M.C., & Henningsgaard, P. (2021). Publishing translated books for young readers in Australia. *Publishing Research Quarterly*, 37, 573-599. doi: 10.1007/s12109-021-09841-6.
- [5] De-occupation of the book market. How Russian publishers are still making money in Ukraine. (2023). Retrieved from <https://sensormedia.com.ua/books/deokupatsiia-knyzhkovoho-rynku-yak-rosiyski-vydavtsi-dosi-zarobliaiut-hroshi-v-ukraini/>.
- [6] Gudina, A., & Grigas, V. (2022). Two decades of e-book publishing in a small language market: Publishers lagging behind pirates. *Publishing Research Quarterly*, 38, 490-502. doi: 10.1007/s12109-022-09894-1.
- [7] Guren, C., McIlroy, T., & Sieck, S. (2021). COVID-19 and book publishing: Implications and ideas for 2021. *Publishing Research Quarterly*, 37, 1-14. doi: 10.1007/s12109-021-09791-z.
- [8] Hirik, S.I. (2022). *Book publishing in Ukraine*. Retrieved from <http://surl.li/rneudl>.
- [9] Horbenko, H.V. (Eds.). (2019). *Publishing activity in the context of the development of new technologies: Study of specialists' requests*. Kyiv: Institute of Journalism at Borys Grinchenko Kyiv University.
- [10] Horobets, O.O. (2018). Statistical analysis of book publishing in Ukraine and the world. *Statistics of Ukraine*, 81(2), 22-29. doi: 10.31767/su.2(81)2018.02.03.
- [11] ICIP: Ukrainians spent a billion hryvnias on books under the ePromotion programme. (n.d.). Retrieved from <https://www.kmu.gov.ua/news/mkip-ukrayinci-vitratili-milyard-griven-na-knizhki-v-ramkah-programi-yepidtrimka>.
- [12] Konstantinova, N. (2021). *Ukrainian books under a leaky "state umbrella"*. Retrieved from <https://www.radiosvoboda.org/a/ukrainska-knyzhka-pid-dyravoyu-derzhavnoyu-parasolkoyu/31397468.html>.
- [13] Kotliarevskiy, Ya.V., Melnykov, O.V., Yermolychev, R.V., Dereviankin, V.V., & Shtanhret, A.M. (2017). Development of publishing in the context of improving competition policy regulation and state aid. *Scientific Papers of the Financial Research Institute*, 4(81), 104-127.
- [14] Koval, O. (2023). *To develop Ukrainian book publishing and maintain a sufficient level of reading among the population, Ukraine needs EUR 100 million annually*. Retrieved from <https://www.ukrinform.ua/rubric-culture/3714234-dla-rozvytku-knigovyidannya-i-pidtrimki-citanna-ukraini-potribno-soroku-100-miljoniv-koval.html>.
- [15] Kuzmuk, I.V. (2016). *Small book publishing in Ukraine through the prism of all-Ukrainian book ratings and*

- [awards \(2009-2013\)](#). *Printing and Publishing*, 2(72), 285-290.
- [16] Law of Ukraine No. 2309-IX "On Amendments to Certain Laws of Ukraine on Establishing Restrictions on the Import and Distribution of Publishing Products Relating to the Aggressor State, the Republic of Belarus and the Temporarily Occupied Territories of Ukraine". (2022, June). Retrieved from <https://zakon.rada.gov.ua/laws/show/2309-20#Text>.
- [17] Law of Ukraine No. 2313-IX "On Amendments to Certain Laws of Ukraine Concerning the Stimulation of Domestic Publishing and Book Distribution Development". (2022, June). Retrieved from <https://zakon.rada.gov.ua/laws/show/2313-20#Text>.
- [18] Lysenko, O. (2023). *Inexperienced workers, fading and Russian attacks: The struggle of Ukrainian books for printing*. Retrieved from <https://life.pravda.com.ua/culture/2023/08/1/255679/>.
- [19] Melnyk, R. (2023). *The number of books published in Ukraine halved in 2022*. Retrieved from <https://detector.media/infospace/article/207821/2023-02-08-u-2022-mu-udvichi-zmenshyas-kilkist-vydanykh-v-ukraini-knyg/>.
- [20] Melnyk, T. (2022). *Ukrainian book publishing has fallen by more than 50% since the beginning of the year*. Retrieved from <https://forbes.ua/news/ukrainske-knigovidannya-skorotilosya-na-ponad-50-vid-pochatku-roku-15062022-6598>.
- [21] Morozov, O. (2022). *We were not ready for such a load! About 1,000 for vaccination and business*. Retrieved from <https://www.village.com.ua/village/business/buisness/321193-epidtrymka-planeta-kino-nash-format-laboratoriya-2022>.
- [22] Onyshchuk, M., & Tatarinova, L. (2021). 2019: The most successful year for book publishing before the COVID-19 pandemic. *Bulletin of the Book Chamber*, 2, 10-15. doi: 10.36273/2076-9555.2021.2(295).10-15.
- [23] Orlova, Yu. (2019). *How is book publishing developing in Ukraine*. Retrieved from <https://zaxid.net/yak-rozvivayetsya-knigovidavnistvo-v-ukrayini-n1487933>.
- [24] Price, L. (2022). Fanfiction, self-publishing, and the materiality of the book: A fan writer's autoethnography. *Humanities*, 11(4), article number 100. doi: 10.3390/h11040100.
- [25] Senchenko, M., & Buryak, S. (2021). *Book publishing in modern Ukraine: Status, trends and development prospects*. Retrieved from <https://www.upba.org.ua/index.php/uk/zakonodavstvo/knyzhkova-palata/item/279-knyhovydavnycha-diialnist-suchasnoi-ukrainy-stan-tendentsii-ta-perspektyvy-roztytku>.
- [26] Skrypchuk, H.V. (2019). The development of book publishing in Ukraine since independence. *Scientific Bulletin of Uzhhorod National University. Series of International Relations*, 5, 35-42. doi: 10.32782/2663-5267.2019.5.05.
- [27] Sukhorukova, O. (2016). *World book publishing: Lessons for Ukraine*. *Foreign Trade: Economics, Finance, Law*, 3, 47-58.
- [28] Survey: Offices and warehouses of 22% of Ukrainian publishers damaged by hostilities. (2022). Retrieved from <https://detector.media/infospace/article/198355/2022-04-13-ofisy-ta-sklady-22-ukrainskykh-vydavnytstv-poshkodzheni-v-rezultati-boyovykh-diy-opytuvannya/>.
- [29] The Book Chamber of Ukraine: In 2023, more than 90% of publications were printed in Ukrainian. (2023). Retrieved from <https://zmina.info/news/knyzhkova-palata-ukrayiny-2023-roku-ponad-90-vydan-bulo-nadrukovano-ukrayinskoju/>.
- [30] The number of Russian-language books published in Ukraine decreased by almost 60%. Monitoring of the work of the State Committee on Television and Radio Broadcasting in the second half of 2022. (2022). Retrieved from <https://detector.media/infospace/article/206338/2022-12-26-kilkist-vydanykh-v-ukraini-rosiyskomovnykh-knyzhok-zmenshyas-mayzhe-na-60-monitoryng-roboty-derzhkomtelradio-za-drughe-pivrichchya-2022-roku/>.
- [31] The UK's position on the provision of certificates and subsidies has been clarified. (2023). Retrieved from <https://ubi.org.ua/uk/news/kategoriya-2/utochnena-poziciya-uik-schodo-nadannya-sertifikativ-i-subsidiy>.
- [32] Velagić, Z. (2022). Society and publishing: The mediation of the book in the first decades of the 21st century. *Anafora*, 9(1), 1-24. doi: 10.29162/ANAFORA.v9i1.1.
- [33] Vorontsova, A., & Cherniak, H. (2022). Book publishing activity in Ukraine in 2021. *Bulletin of the Book Chamber*, 8, 5-13. doi: 10.36273/2076-9555.2022.8(313).5-13.
- [34] Yarema, O. (2023). *Book production in Ukraine increased by 73% in 2023*. Retrieved from <https://detector.media/infospace/article/220936/2023-12-22-u-2023-rotsi-vypusk-knyzhok-v-ukraini-zbilshyvysya-na-73/>.
- [35] Yezhyzhanska, T. (2023). Ukrainian book publishing houses in a permanent crisis. *Bulletin of the Book Chamber*, 6, 29-35. doi: 10.36273/2076-9555.2023.6(323).29-35.
- [36] Zahorui, A., & Khmelovska, O. (2022). *9 months of invasion: How Ukrainian publishers work during the war*. Retrieved from <https://chytomo.com/9-misiatsiv-vtorhnennia-ia-k-zaraz-pratsiuiut-vydavtsiv-v-ukraini/>.
- [37] Zelenchuk, V. (2023). *Ukrainian books at war: how the state saves them*. Retrieved from <https://imi.org.ua/monitorings/ukrayinska-knyga-v-umovah-vijny-yak-yiyi-ryatuye-derzhava-i55985>.

Книговидання в Україні в умовах російсько-української війни (2014-2024 рр.): основні тенденції розвитку

Валентина Молоткіна

Доктор історичних наук, професор
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<http://orcid.org/0000-0001-6092-5927>

Юлія Молоткіна

Доктор філософії в галузі філології
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0000-0002-5245-726X>

Анотація. Росія веде гібридну війну проти України з 2014 року з метою не допустити її виходу зі сфери свого впливу. Ця агресія має не лише військову, економічну та дипломатичну складову, а й інформаційну, зокрема в питанні регулювання книжкового ринку. Після повномасштабного вторгнення питання захисту українського слова стало одним із чинників національної безпеки. Адже, окрім ринкового тиску, нині РФ веде війну проти української книги на зовсім іншому рівні: вбиває авторів, цілеспрямовано знищує бібліотеки та викорінює українську літературу з окупованих територій. Тому питання розвитку книговидавничої справи, вивчення її стану є актуальними і потребують поглибленого вивчення. У цій статті автори мали на меті дослідити основні тенденції, що вплинули на розвиток книговидавничої справи в Україні в 2014-2024 рр. Методологія статті ґрунтується на використанні історичного, ретроспективного, логічного, хронологічного, аналітичного методів наукового дослідження. Встановлено, що важливим досягненням книговидавничої галузі стало зміщення читацьких інтересів у бік україномовної книги. Як наслідок, збільшилася кількість нових видань, з'являються такі книжкові тренди, як дитяча розвиваюча література, мотиваційна чи бізнес-література, іноземні бестселери. З'ясовано, що через війну з РФ та економічний спад в країні у 2014-2015 рр. книжковий ринок зазнав занепаду. У 2016-2019 рр. спостерігалось певне пожвавлення, розширився жанровий спектр книжок, збільшилася частка україномовної літератури на ринку. У 2020 р. через економічну кризу, спричинену пандемією, відбулося скорочення книговидання. У 2021 р. темпи падіння сповільнилися, кількість назв збільшилася. Після 24 лютого 2024 р. видавництва та друкарні припинили роботу. Проте за декілька місяців більшості видавництв вдалося відновити роботу, налагодити нові логістичні маршрути, знайти фінансування. Результати цієї розвідки можуть бути використані для подальшого розроблення наукової проблематики, окресленої в статті, а також слугувати основою для розробки та викладання відповідних курсів у закладах вищої освіти.

Ключові слова: видавнича діяльність; книговидавничий сектор; книжкова торгівля; література; мова



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 9, No. 2, 19–28

Article's History: Received: 26.01.2024 Revised: 22.04.2024 Accepted: 28.06.2024

UDC 364.3/6-322-787.26+342.922.071.3]:355.48](477)''2013/2024''(045)Д:045

DOI: 10.69587/sdc/2.2024.19

Ukrainian volunteer movement and development of civil society (2014 – February 2022)

Maksym Taran*

Postgraduate Student

Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0009-0008-5002-6192>

Abstract. The volunteer movement, which was formed after the Revolution of Dignity, played a significant role in the transformation of socio-political processes in Ukraine, as well as in the repulsion of Russian aggression since 2014 and social protection of the population, in particular internally displaced persons, as well as its importance in the formation of civil society in Ukraine is insufficiently studied. The purpose of the work was to highlight the role of the volunteer movement in the formation of civil society in Ukraine, starting with the Revolution of Dignity, when radical changes took place in various spheres of life in Ukrainian society, and before the beginning of the full-scale invasion of the Russian Federation on the territory of Ukraine. The following methods of scientific knowledge were used in the work: theoretical analysis, synthesis, historical method, as well as analysis of scientific publications. It was established that by the end of 2013, the volunteer movement, despite some support from the state, including its legislative regulation, developed rather slowly, as did the institution of civil society in Ukraine. It was found that the events of the Euromaidan and the Revolution of Dignity led to transformational processes in the socio-political and socio-economic life of the country, finally forming the institution of civil society and had a decisive influence on the rise of the volunteer movement in Ukraine. The process of mass creation of public associations, including charitable and volunteer organizations, was investigated. The participation of representatives of the volunteer movement in comprehensive support of the participants of the anti-terrorist operation and the civilian population, in particular internally displaced persons, environmental protection, charitable activities and educational work was summarized. The practical value of the work lies in the fact that the author comprehensively investigated the role of the volunteer movement in the establishment and development of civil society in Ukraine, and its results can be used by public associations in the organization of volunteer work

Keywords: anti-terrorist operation; charitable activity; internally displaced persons; volunteer organizations; civil society; public associations; Revolution of Dignity

Introduction

The volunteer movement in Ukraine in the modern sense was established with the country's independence. However, the activities of volunteers in the first two decades of Ukraine's modern history were mainly

limited to providing assistance to socially vulnerable groups, environmental protection, and implementing various educational projects. The Euromaidan and Revolution of Dignity events, and especially the war in eastern

Suggested Citation:

Taran, M. (2024). Ukrainian volunteer movement and development of civil society (2014 – February 2022). *Society. Document. Communication*, 9(2), 19–28. doi: 10.69587/sdc/2.2024.19.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author

Ukraine, have taken the development of the volunteer movement to a new level, bringing together millions of people and becoming one of the most important factors in the formation of civil society in Ukraine. It was in the post-Maidan period that the volunteer movement in Ukraine took shape in its current form. The Ukrainian public and government are aware of the significant assistance provided by volunteers in the fight against the full-scale Russian military invasion of Ukraine that began in February 2022. It was the public and state interest that led to the need for a scientific study of the volunteer movement in Ukraine in 2014-2021. At that time, volunteers not only provided substantial assistance to Ukrainian soldiers and civilians, they became an integral part of Ukraine's resistance to Russian aggression, contributed to socio-political and socio-economic transformations in our country, and united Ukrainian society around the ideas of democracy and Ukraine's European choice.

The study is timely because of the importance of the assistance provided by volunteers to the Armed Forces of Ukraine in 2014-2021 and to civilians during the second period of the Russian-Ukrainian war, which began in February 2022, as the Ukrainian army was virtually destroyed by the previous regime of V. Yanukovych in 2014, lacking the most basic necessities, including household items, and state institutions were unable to provide the army with full supplies. Instead, the comprehensiveness of the study of the volunteer movement in Ukraine in 2014-2022 was due to the need to improve the forms and methods of work of volunteer organisations, which they have been carrying out since the beginning of Russia's full-scale military invasion of Ukraine.

Finally, the relevance of the chosen research topic is also due to the fact that it was the volunteer movement that played a decisive role in the victory of the Revolution of Dignity, the final formation of the democratic vector of the country's development, and the defence of the Motherland in the most critical period of its history, when in the spring of 2014 the fate of our country and its European choice was decided, when it was thanks to volunteers whose activities were supported by millions of Ukrainians that the Ukrainian army received all the necessary equipment and stopped Russian aggression, and the forced migrants were able to resettle in the eastern regions of Ukraine. In addition, volunteers actively participated in the processes of state-building, socio-economic and socio-political transformations in our country. Thanks to volunteers, Ukraine survived as a state in 2014 and 2022.

The volunteer movement problem in Ukraine in the context of civil society development has always attracted the attention of many scholars, politicians, public and cultural figures, and journalists. For example, O. Bakovetska (2020), considering the formation of the volunteer movement in Ukraine at the beginning of the 21st century, analysed the reasons for the intensification of volunteer activity, linking them to the

Revolution of Dignity and the outbreak of hostilities in eastern Ukraine, and, based on statistical data, identified priority areas of activity of volunteer and charitable organisations. A similar opinion was shared by O. Nagornyuk (2020), who believes that the end of 2013 – beginning of 2014 was the culmination of the rise of the volunteer movement in Ukraine, which became the driving force behind social transformations in our country. The process of establishing volunteer organisations in Ukraine was examined on the example of Odesa Region. Various aspects of volunteer activity, primarily assistance to the military and internally displaced persons, as well as legal regulation of the establishment of volunteer organisations, were discussed in a recently published collective manual edited by V. Vashkovich *et al.* (2022). However, the role of volunteerism in the development of civil society in Ukraine was not covered in this study. Researcher O. Golovko (2023) in an article focused on the main stages of the volunteer movement development in Ukraine since 1991, believing that in the period from the end of 2013 to 2016, the volunteer movement became part of civil society, while the main reason for the intensification of volunteer activity in Ukraine was the Russian armed aggression that began in 2014. The volunteer movement as a component of civil society was considered in the article by L. Zhuzha (2019) through the prism of civil society functions, taking into account the factor of the anti-terrorist operation (ATO), which had a decisive impact on the rise of volunteer activity in Ukraine. The author also emphasised the fact that the volunteer movement as a component of civil society has taken over some of the functions of the state, especially in providing for combatants, thus turning the civil society institution into a partner of the state. Finally, the Analytical Report (National Institute for Strategic Studies, 2021) dedicated to the development of civil society in Ukraine in 1991-2011, prepared by the team of authors of the National Institute for Strategic Studies, examined certain aspects of the development of the volunteer movement, in particular, the problems of legal regulation of volunteer and charitable activities. At the same time, the authors of the publication did not highlight the main areas of volunteer activity. Thus, the issue of development of the volunteer movement in Ukraine and its impact on the formation of civil society is currently insufficiently studied. Therefore, the purpose of this article was to analyse the experience of volunteer organisations in Ukraine during the first period of the Russian-Ukrainian war and their impact on the development of civil society. This study was based on the identification of the main aspects of both the volunteer movement and the development of civil society and the cause-and-effect relationship between the rise of the volunteer movement and the formation of civil society and the formation of a modern national outlook aimed at national and European choice.

Literature Review

The issue of the impact of the volunteer movement on the formation of civil society in Ukraine has attracted the attention of many national researchers. Among them, it is worth highlighting the works of D.M. Gorelov & O.A. Kornievskiy (2015), especially the analytical report issued by the National Institute for Strategic Studies in 2015. Analysing the foreign experience of volunteer movement development and the specifics of its application in Ukraine, the authors of the analytical report considered the volunteer movement in Ukraine through the prism of countering external aggression, and also assessed the legal support of volunteer activity in Ukraine.

The general aspects of the volunteer movement development and its impact on social transformations in Ukraine in the post-Maidan period have been reflected in the works of many researchers. Thus, the publication of V. Bolotova *et al.* (2018), was devoted to the development of the volunteer movement in Ukraine as a type of social activity, revealed the main directions and forms of volunteer activity, analysed the process of the volunteer movement's growth in Ukraine in the context of hostilities in the East of Ukraine, and the role of volunteers in supporting socially vulnerable groups (disabled people, the elderly, children, orphans, etc.). The materials of this publication are based on a sociological survey conducted among Kharkiv residents to identify their volunteer activity. The researcher O. Golovko (2023) focused on the historical and legal aspects of the formation and development of the volunteer movement in Ukraine, identified the main stages of development of this social phenomenon, while, according to the author, with the stabilisation of the internal and external situation in Ukraine during 2017-2021, there was a decrease in the interest of citizens in volunteering. The article by L. Zhuzha (2019) examined the development of civil society in Ukraine under the influence of the anti-terrorist operation, the role of volunteers in supporting the military, with the main focus on the functions of civil society, the basic of which, according to the author, were social, economic and military functions. According to M. Matyash (2017), one of the most important consequences of the Revolution of Dignity was the emergence of the volunteer movement. This publication highlighted the development of the volunteer movement in the world and in Ukraine, and the author concluded that until the end of 2013, the volunteer movement in Ukraine, compared to other countries, was developing rather poorly (as of 2010, no more than 5% of the population was engaged in volunteer work in our country), but the events of Euromaidan and the Revolution of Dignity led to an increase in volunteer activity. The occupation of Crimea by Russian federation and the outbreak of hostilities in the East of Ukraine have brought the development of the volunteer movement in Ukraine as a component of civil

society to a new level. Instead, the researcher G. Zhekalov (2015) in an article emphasised that since 2014, the volunteer movement in Ukraine has become one of the most important forms of self-organisation of the population, which was manifested first in providing all the necessary supplies to tent camps, and later in repelling Russian aggression, including through the organisation and support of volunteer battalions.

The political direction of the volunteer movement as an institution of civil society was the subject of a study by M. Kudrya (2018). The author analysed the volunteer movement as a factor of self-organisation of society, noting that it was volunteer activity that contributed to the transformation of civil society in Ukraine, which was based on volunteering. After the events of Euromaidan and the Revolution of Dignity, the volunteer movement gradually turned into an influential foundation of Ukrainian society, spreading the Ukrainian national idea and Ukraine's European choice and fighting against Ukrainophobic propaganda, and 2014, according to the author, was the year of birth of Ukrainian volunteering.

The study of the general principles and main problems of the development of the volunteer movement in the post-Maidan period was devoted to the publications by O. Pankova *et al.* (2016). In particular, the collective work examined the main problems of the development of the volunteer movement in Ukraine in 2014-2015 and ways to overcome them, as well as the peculiarities of attracting the necessary social resources for volunteering. In turn, the article by A. Matyichuk (2016) focused on the development of the volunteer movement in Ukraine in 2014-2015, which, according to the author, acquired signs of institutionalisation during this period. G. Melnychuk (2018), emphasising the role of the volunteer movement in strengthening civil society, drew attention to the activities of volunteer organisations in the context of an effective tool for influencing the authorities and their interaction with state bodies.

Finally, foreign experience in the development of volunteering as a component of civil society was considered in the work of M. Strepko (2018). Using the example of Germany, the author examined the development of volunteerism in foreign countries as an institution of civil society, noting that, unlike Ukraine, where the main driving force of volunteer organisations was young people, in Germany a significant part of the volunteer movement was made up of people of retirement age.

At the same time, it should be noted that the events of the Revolution of Dignity and the initial stage of the ATO occupied the central place in most publications on the development of the volunteer movement in the context of the transformation of Ukrainian society, while the activities of volunteer organisations and the role of the volunteer movement in the formation of civil society before the full-scale invasion of Ukraine by Russia are insufficiently studied.

Materials and Methods

The materials used in the study consist of the legal acts Law of Ukraine No. 3236-VI (2011), Law of Ukraine No. 5073-VI (2012), Law of Ukraine No. 4572-VI (2012), as well as analytical studies (Kornievskyi, 2015), publications in online media, as well as analysis and systematisation of materials from the public websites of the then known volunteer organisations "Come Back Alive", "Phoenix Wings", "Army SOS", "Peoples Project", "Home Front", and published scientific works described in the previous section, which became the basis for this study, made it possible to determine the place of volunteers and the volunteer movement in the history of Ukraine as a component of civil society and the role of volunteers in the current Russian-Ukrainian war.

The interdisciplinary approach used in the study, based on the involvement of various scientific disciplines such as political science and sociology, allowed for a deeper and more comprehensive analysis of the volunteer movement in Ukraine in the period of 2014-2020. The comparative historical method allowed for a comparison of the dynamics of the development of volunteer and charitable organisations in the historical context at the initial stage of the formation of civil society. In collecting materials for the study, the heuristic method was used, which involves a systematic search for new data and publications of domestic research by leading scholars, contributing to a deeper understanding and analysis of the issues and the need for scientific research of the volunteer movement and its impact on the development of civil society. To help the reader understand the volunteer movement in Ukraine as a European phenomenon, the author used the method of historical retrospective to reveal the origins of the volunteer movement in Europe and Ukraine. The study also highlighted the circumstances of the formation of the volunteer movement in Ukraine in 1991-2013, as well as the activities of the first volunteer organisations in the country. Using the sociological method, a social and age profile of participation in these organisations by representatives of different social strata and age groups was also conducted. Using the problematic and chronological research methods, the author established the circumstances of the intensification of the volunteer movement in Ukraine in 2013-2016, examined the legal regulation of volunteer organisations, determined the content and nature of their activities, and revealed the forms and methods of work of volunteer organisations, showed their relations with public authorities and local self-government bodies, and identified the reasons for the decline in the activity of Ukrainian volunteers in 2016-2019. In turn, using the analytical method, the study found out how well-known volunteers became advisers to ministers and members of parliament, and also found out their desire to apply their experience in public service. Using the comparative and statistical methods, the article compared statistical data on the number of volunteers in the leading

countries of modern Europe and Ukraine, which made it possible to compare the quantitative component of the volunteer movement, gender and age profile, as well as to trace the cause and effect of the number of people involved in the volunteer movement and their impact on the development of civil society.

The use of such methods of historical research as analytical, chronological, sociological and historical retrospective allowed the author to highlight the development of the volunteer movement in Ukraine in 2014-2021 both comprehensively and in its individual components, namely, volunteer organisations, activities of famous volunteers, legislative support and the relationship of volunteers with the state authorities as a continuous process of scientific knowledge of the development of civil society during this period. Nevertheless, the applied principle of historicism allowed the author to establish the historical truth based on facts, determining the place of factors influencing the historical process in the formation of the volunteer movement in 2014-2021.

Results and Discussion

The volunteer movement in Ukraine was established after the country gained its independence. Representatives of a small number of Ukrainian and international volunteer organisations provided comprehensive social assistance to the population, worked in the fields of education, science, culture, environmental protection, etc. At the same time, in the early 2000s, there was a legislative regulation of volunteer activity. A number of legal acts were adopted that enshrined the status of a volunteer at the state level, including the following, Law of Ukraine No. 3236-VI "On Volunteering" (2011). After the adoption of this law, a number of legal acts were amended to treat volunteers as equal subjects of civil relations. Also, the Law of Ukraine No. 4572-VI "On Public Associations" (2012), the Law of Ukraine No. 5073-VI "On Charitable Activities and Charitable Organisations" (2012) and other legal acts were adopted.

At the same time, by the end of 2013, the volunteer movement in Ukraine, despite some legislative support from the state, was not particularly active, new civil society organisations were being established rather slowly, and civil society itself, which was still in its infancy, faced all sorts of obstacles from the V. Yanukovich regime, which was increasingly inclined towards authoritarianism. The 2012 elections to the Verkhovna Rada of Ukraine, when pro-government candidates, especially those from the Party of Regions of Ukraine, won a majority, particularly in single-member constituencies, due to significant fraud, only confirmed this trend. The government's abandonment of the European integration course and the economic and political rapprochement of the V. Yanukovich regime with Russia, on the one hand, led to mass protests in late 2013, and on the other hand, played a crucial role in the further development of

the volunteer movement and the establishment of the foundations of civil society in Ukraine.

It was the events of Euromaidan and the Revolution of Dignity that sparked the rise of volunteerism and civic engagement in Ukraine, with millions of people across the country protesting against the authoritarianism and pro-Russian policies of V. Yanukovich. The beating of students by Berkut on the night of 29-30 November 2013 shook the whole country. The Euromaidan, which later grew into the Revolution of Dignity, eventually led to the fall of the then-president's criminal regime. In turn, volunteers played a major role in supporting the Maidan, providing its participants with everything they needed such as hot meals, warm clothes, medicines, etc. And during the events of 18-20 February 2014, thanks to the efforts of volunteers, the evacuation of wounded protesters was organised. In this regard, it can be stated that the Maidan, as well as the volunteer movement of that period, evolved from the people and received the support of the majority of the country's population. At the same time, volunteers provided assistance to the Maidan participants free of charge, on a voluntary basis and on the basis of "a kind of mutual assistance" M. Matyash (2017), O. Nagornyuk (2020).

A comprehensive study of the rise of the volunteer movement during the revolutionary events of late 2013 and early 2014 is available in the research conducted by G. Zhekalo (2015). The author concludes that since 2014, the volunteer movement in Ukraine has become one of the most important forms of self-organisation of the population, which manifested itself in the material support of tent cities throughout the country (provision of food, medicines, household items), "personal performance of social, educational, medical, informational work", as well as in the defence of the country from Russian mercenaries and illegal armed groups in the East of Ukraine, when thousands of Maidan Self-Defence participants and other citizens joined volunteer battalions to fight against external and internal threats (Kornievskiy, 2015).

Volunteer activity intensified especially with the occupation of Crimea by Russia and the outbreak of hostilities in eastern Ukraine in spring 2014. At the same time, the volunteer movement covered all spheres of socio-political, socio-economic and humanitarian life of the country, and in many cases, former participants of the Revolution of Dignity became the organisers and active figures of the volunteer movement. In the following months, tens of thousands of Ukrainian citizens joined the volunteer movement and took an active part in raising funds, providing Ukrainian soldiers at the front with everything they needed, helping internally displaced persons from the occupied areas of Donbas and Crimea, etc (Taran, 2023a).

As noted by L. Zhuzha (2019), the importance of the volunteer movement in the transformation of social processes in the post-Maidan period also lies in

the functions aimed at the development of civil society performed by volunteers, including social function (providing ATO/JFO participants with everything they need), economic function (raising funds and material items for military personnel and internally displaced persons), military function (participation of volunteers in volunteer formations, while providing weapons was the prerogative of the state, and equipment and vehicles were the responsibility of both the state and the volunteers themselves), the function of organisation and self-organisation (streamlining the activities and support of volunteers, especially those "who were sent to the ATO/JFO area from a given district or city", that is helping their fellow citizens), the function of mobilisation (facilitating the mobilisation of the population to defend the country), the function of coordination (coordinating the efforts of patriotic citizens to support the military and residents of the eastern regions of the country), the function of integration (bringing people together to help the military and civilians), communication function (organisation of relations between the community and the military, IDPs and government representatives), consolidation function (uniting citizens to strengthen the fight against internal and external threats), political consolidation function (promoting the formation of public qualities), identification function (focused on strengthening the sense of belonging to the Ukrainian nation and state). At the same time, at the initial stage of the ATO, it was the social, economic and military functions of civil society that played a leading role.

According to O. Gorelov & D. Kornievskiy (2015), the rise of the volunteer movement in Ukraine in 2014 was due to two factors, "the internal political crisis, which led to an imbalance in the public administration system, a lack of quality management decisions, and a lack of resource capacities, and external aggression, which deepened the imbalance between the state's ability to effectively perform its functions and meet the basic needs of citizens".

Analysing the European experience of developing the volunteer movement as a component of civil society, G. Melnychuk (2018) concluded that, unlike in Ukraine, the share of people directly engaged in volunteer work is much higher. In general, approximately 100 million people in the EU countries are involved in volunteering, contributing up to 5% of the region's GDP, and in countries such as the UK, Sweden, Austria and the Netherlands, more than 40% of the adult population is engaged in volunteer work. At the same time, in countries such as Italy, Greece, Bulgaria and Lithuania, the volunteer movement is less widespread, with no more than 10% of the population engaged in volunteering.

It can be stated that in European countries, volunteers partially fulfil the functions of the state in terms of social support for the population, as well as create and implement various humanitarian programmes. For example, in Germany, the volunteer movement helps the

state solve various social and cultural problems. Unlike Ukraine, where the driving force behind the volunteer movement is the younger generation, in Germany, people of retirement age are actively involved in volunteering. Gradually, three groups of volunteer organisations were formed in Germany. The first one brings together volunteers who work to improve the welfare of society. The second group includes volunteers united by common interests. The third group is represented by volunteers who primarily work to improve the welfare of the organisation (Strepko, 2018).

Returning to the volunteer movement in Ukraine, it should be noted that through their activities, volunteer organisations and individual volunteers implemented tasks that should have been performed by public authorities, the armed forces and individual volunteer military associations, which was clearly observed at the beginning of the anti-terrorist operation in 2014-2015, when one of the activities of volunteer organisations was to assist the Armed Forces of Ukraine and other military formations that joined the anti-terrorist operation (ATO) in eastern Ukraine. This rapid activity of volunteers was due to the fact that the Ukrainian army was virtually destroyed during the presidency of V. Yanukovich, and other security forces involved in the hostilities needed the most basic necessities, including weapons, uniforms, vehicles, food, communications and hygiene, which were largely provided by the efforts of volunteer organisations (Taran, 2023b).

This period was characterised by the formation of the leading volunteer organisations in Ukraine: "Come Back Alive", "Wings of the Phoenix", "Army SOS", "People's Project", "People's Home Front", "Volunteer Community", etc. The main activity of most of them was to help ATO/JFO participants (approximately 70% of volunteers were involved in this). Significant attention was also paid to addressing the social and domestic issues of the civilian population, especially internally displaced persons (IDPs), whose number increased dramatically with the outbreak of active hostilities in Donbas in the spring and summer of 2014, and as of 2021, the number of internally displaced persons was approximately 1.5 million, as noted by M. Taran (2023a). Volunteer organisations and centres were also established at the regional and local levels.

Specialised volunteer organisations providing assistance to internally displaced persons have gradually emerged, including the following CF "Right to Protection", "Everyone can help", CF Rehabilitation Centre "Maidan Hospital", "Good deeds Fund", etc. In addition to humanitarian support for IDPs, specialised volunteer organisations focused their activities on "providing medical and psychological assistance to internally displaced persons, social services and social security for IDPs, creating new jobs, helping to start their own business, solving problems related to pensions and social benefits, registering IDPs, etc." (Vashkovich *et al.*, 2022).

The volunteer movement during this period was characterised by joint emotional activity of all segments of the country's population. Examples of patriotic interaction aimed at helping ATO soldiers, internally displaced persons who had lost their permanent place of residence and found themselves in new, difficult economic and psychological conditions, and the families of the dead and injured were becoming widespread.

Considering the volunteer movement from this perspective, in the realities of the Revolution of Dignity and the beginning of the Russian-Ukrainian war, it should be noted that Ukrainian society was at the initial stage of transformation towards self-determination in the period of transition from a latent perception of its own independence to the need to fight for it. "This process can be interpreted as a basis for the formation of a nationally oriented personality, where the principles of a new educational humanistic philosophy should dominate, among which the leading ones are universal values that allow the implementation of democratic, humanistic ideas", according to V. Molodychenko & N. Molodychenko (2017).

Highlighting the main stages of the formation and development of the volunteer movement in Ukraine after independence, O. Golovko (2023) believes that it was the third stage, which covered the period from the end of 2013 to 2016, that marked the transformation of the volunteer movement into a civil society institution. This was caused by the revolutionary events of late 2013 – early 2014 and the fighting in the East of Ukraine. Various forms and areas of volunteer activity emerged, including providing assistance to ATO participants (the so-called army volunteering), internally displaced persons from Crimea and Donbas, searching for dead and missing soldiers (search volunteering); the legal framework regulating the establishment of volunteer organisations, the rights and obligations of volunteers was gradually improved.

In the following years (before the full-scale invasion of Ukraine by Russian federation), according to the author, the internal life and external situation in the country stabilised, a significant number of volunteer organisations ceased or curtailed their activities, and the most well-known organisations focused mainly on social, educational and cultural projects, not neglecting assistance to the military and internally displaced persons, however, these areas of volunteering, which were the main ones in 2014-2016 have become a priority for state authorities and local governments, which have taken on the main burden of providing for the military and civilians. However, the coronavirus pandemic has somewhat intensified the volunteer movement in Ukraine on the eve of the war.

According to M. Matyash (2017), the volunteer movement, which played a crucial role in supporting the Maidan, has become "the main driving force behind the country's reforms and an important component

of civil society", which has united millions of Ukrainians in one way or another. After the occupation of Crimea and the outbreak of hostilities in eastern Ukraine, the author believes that "volunteering has risen to the highest level of development since Ukraine's independence.... It was thanks to volunteers that in 2014 the country preserved its sovereignty, stopped Russian aggression in the east and restored a combat-ready army with high morale". In turn, this combat-ready army, with the effective support of volunteers and millions of our compatriots, was able to withstand the full-scale invasion of Ukraine by Russian federation in February 2022 and defend its independence for the second time in the modern history of Ukraine.

Public support for volunteers, including financial donations, is evidenced by numerous sociological surveys conducted in 2014-2020. For example, in a survey on the state of volunteering conducted on 20-26 November 2014, which covered almost the entire territory of Ukraine, with the exception of Crimea, 62% of respondents stressed the significant role of volunteers in the country's socio-political transformations, 85% noted the role of volunteers in strengthening peace in Ukraine, and 81% of respondents considered the volunteer movement an important component of civil society. At the same time, about a quarter of respondents were actively involved in the volunteer movement and/or provided financial assistance, primarily to the army, in 2014. At the same time, according to research by the Ilko Kucheriv Democratic Initiatives Foundation and the Razumkov Centre, 47% of respondents provided financial or material assistance to public organisations, including volunteer organisations. However, with the stabilisation of the country's internal political and socio-economic situation, this figure has significantly decreased in the following years (to 42% in 2016, 41% in 2017, 38.5% in 2018, and 20.9% in 2020). In 2019, 68% of citizens trusted volunteers, while 61% trusted the Church and the Armed Forces of Ukraine (Kudrya, 2018; Bakovetska,

2020). However, compared to 2015, the level of trust in volunteer organisations has slightly decreased (at that time it was 74%).

Moreover, at the initial stage of the military confrontation in eastern Ukraine, the volunteer movement essentially took over the functions of the state, "providing the military with everything from food to resuscitation vehicles, jeeps and sophisticated optics". In 2015, up to 65% of volunteers were involved in helping the army. By comparison, 21% of volunteers were involved in helping the sick and disabled, while the rest helped people in difficult life circumstances (primarily IDPs) or were involved in various projects. In total, 14.5 thousand people and more than 2.5 thousand organisations were engaged in volunteer activities in 2014-2015 (Matiychuk, 2016). Ultimately, the volunteer movement became the mechanism that allowed to resist the Russian armed aggression in the East of Ukraine and provide assistance to IDPs from the combat zone, "complemented the functions of state institutions that for one reason or another were not performed or were performed improperly", and its representatives conducted educational activities with children and youth, were involved in social support of the population and environmental protection; the recipients of volunteer assistance were ATO/JFO participants, wounded and captured soldiers and their families, IDPs, and other citizens in difficult life circumstances (Beh, 2015).

The state of development of civil society in Ukraine and the involvement of volunteers in this process is also evidenced by the fact that after the Revolution of Dignity and before the full-scale Russian invasion of Ukraine, the number of registered civil society organisations, including charities and volunteer organisations, increased dramatically. Thus, as of December 2021, 96,258 public organisations were registered in Ukraine, which is 19,193 more than in 2013 (an increase of 25%). The dynamics of registration of public and charitable organisations by year is as follows (Fig. 1).

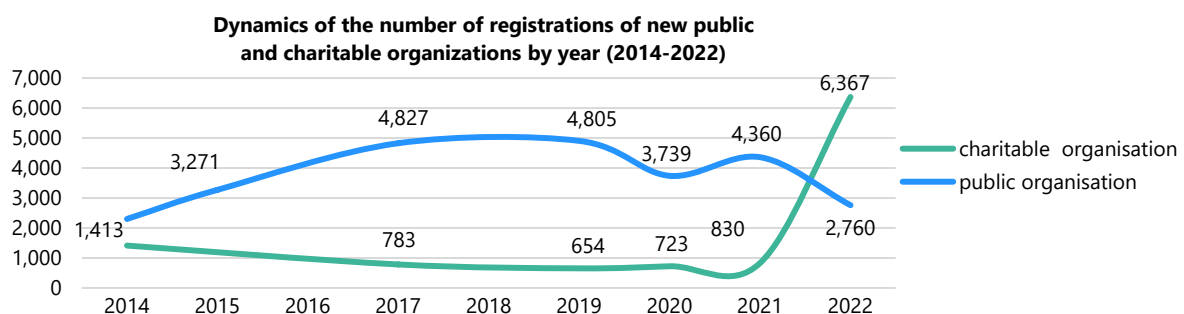


Figure 1. Dynamics of the number of registrations of new public and charitable organisations by year (2014-2022)
Source: compiled by the author based on Ukrainian civil society under the war. A report based on the findings of the study (2023)

At the same time, in the first year of the Russian-Ukrainian war, the number of mentions of charitable organisations, foundations, public associations and volunteer organisations increased almost 10-fold (from

9,398 mentions in February 2022 to 97,940 in November 2022) (77% of public organisations help the Armed Forces..., 2023). The number of registered charitable (including volunteer) organisations at the end of 2021

was 20,499, which is 5,598 (38%) more than in 2013. Finally, since 2014, volunteer organisations and individual volunteers have been establishing close cooperation with the executive authorities, in particular the Ministry of Defence of Ukraine, and local self-government bodies (organising joint events aimed at supporting IDPs), and actively participating in the elections to the Verkhovna Rada of Ukraine and local elections. For example, in October 2014, the Ministry of Defence of Ukraine established the Council of Volunteers, headed by David Arakhamia. The main task of the Council was to provide logistical and medical support to the army, including the purchase of high-tech equipment and repair of vehicles. A month earlier, David Arakhamia, who was the founder of the "People's Project" volunteer organisation, became the Defence Minister's Commissioner for Procurement. In October 2015, Yuriy Biriukov, the founder of the volunteer organisation "Wings of the Phoenix", became an advisor to the Minister of Defence on the issue of material support for the Armed Forces, and a month later, a well-known volunteer, Tetiana Rychkova, was appointed head of the state enterprise for the supply of the Special Operations Forces (Klimenko, 2018). Eventually, in the mid-term elections to the Verkhovna Rada of Ukraine held on 17.07.2016, T. Rychkova was elected as a Member of Parliament of Ukraine (electoral district 27, Dnipro). The founder and leader of the volunteer group "People's Home Front", H. Tuka, served as the head of the Luhansk regional military-civilian administration from 22.07.2015 to 29.04.2016, and then was appointed Deputy Minister for the Temporarily Occupied Territories and Internally Displaced Persons of Ukraine (Matyichyk, 2016).

During the 2014 elections, commanders of volunteer battalions that fought in eastern Ukraine were also elected to the Verkhovna Rada of Ukraine, including the then commander of the "Donbas" battalion Semen Semenchenko (Kostyantyn Hryshyn), the first commander of the Azov regiment Andrii Biletskyi, and during the 2019 elections to the Verkhovna Rada of Ukraine, a well-known volunteer Serhii Prytula became a member of parliament on the list of the "Holos" party.

Summing up all of the above, it is worth emphasising that it was the revolutionary events of late 2013 and early 2014 and the Russian aggression in the East of Ukraine that became a turning point in the development of the volunteer movement, which led to the institutional and organisational formalisation of volunteering during this period, and the volunteer movement received the support of millions of our compatriots and took a worthy place in Ukrainian society, contributing to the final establishment of the civil society institution in the country.

Conclusions

Consequently, the volunteer movement in Ukraine, which was organised in 2014, had a decisive impact on

the final establishment of the foundations of civil society in our country and the European choice of the country's development. Until then, despite the existence of some domestic and foreign volunteer organisations, legislative and organisational support for volunteering from the state, the volunteer movement in Ukraine was developing rather poorly and ranked among the last in Europe in terms of its scale. However, the revolutionary events of late 2013 and early 2014 dramatically changed the face of the volunteer movement in Ukraine, which played a major role in organising Euromaidan and the Revolution of Dignity, and since 2014 has been actively involved in the fight against Russian aggression and socio-political and socio-economic transformations in the country, and has become an important component of civil society in Ukraine, relying on the support of millions of our citizens (approximately three-quarters of Ukrainians trusted volunteers). In 2014-2021, thousands of new public and charitable organisations were created in Ukraine, and it is difficult to imagine their activities without the participation of volunteers. In 2014-2016, numerous volunteer organisations were also established: "Come Back Alive", "Wings of the Phoenix", "Army SOS", "People's Front", "Right to Protection", "Everyone Can Help", "Good Deeds Foundation", etc. New areas of volunteer work have emerged, including providing comprehensive support to ATO/JFO participants and civilians, especially social and legal protection of internally displaced persons. International volunteer organisations also stepped up their activities in Ukraine. With the financial support of international and domestic charitable institutions, various cultural and educational projects and socio-economic development programmes, including support for small business development, were implemented.

In the first years after the Revolution of Dignity, the volunteer movement became institutionalised, gained recognition from society and government agencies, and took over a significant part of the state's functions, including protection against internal and external threats and social security and social support. Volunteer organisations actively cooperated with all segments of the population, as well as with state and local authorities, and well-known volunteers participated in national and local elections. In general, volunteerism as a movement has contributed to the awakening of the calls for unification, self-determination, resilience in the face of the threat to the existence of the state, its independence and autonomy, national awakening, and the simultaneous pursuit of justice and defence of modern democratic principles.

In the future, the process of establishing volunteer organisations at the regional and local levels and their impact on social processes in territorial communities, as well as the interaction of volunteers with local authorities on issues of support for the population and community development, require a deeper study.

Acknowledgements

To the scientific supervisor – **Kotsur V.P.** Academician of the National Academy of Pedagogical Sciences of Ukraine, Deputy Chairman of the National Union of Local History of Ukraine, Honoured Worker of Education of Ukraine, Doctor of Historical Sciences, Professor of the Department of History and Culture of Ukraine and Special Historical Disciplines, for choosing research areas and general management.
Kupchyk O.R. PhD in History, Associate Professor at

the Department of Modern and Contemporary History of Foreign Countries at Taras Shevchenko National University of Kyiv, for methodological advice.
Utvenko V.V. PhD in History, Associate Professor of the Department of Public Administration of the Interregional Academy of Personnel Management, for consultations in the field of public administration.

Conflict of Interest

None.

References

- [1] Bakovetska, O. (2020). Volunteer movement in Ukraine at the current stage of development. *Chronicle of Volyn. All-Ukrainian Scientific Journal*, 23, 36-41. doi: [10.32782/2305-9389/2020.23.06](https://doi.org/10.32782/2305-9389/2020.23.06).
- [2] Beh, I. (2015). [Patriotism: Modern signs and orientations of education](#). *Native School*, 1-2, 3-6.
- [3] Bolotova, V.O., Lyashenko, N.O., & Baydak, T.M. (2018). Voluntary activity in Ukraine as a social activity. *Grani*, 21(9), 47-57. doi: [10.15421/1718114](https://doi.org/10.15421/1718114).
- [4] Golovko, O.V. (2023). Volunteering in Ukraine: Historical and legal aspect. *Law and Security*, 2(89), 9-18. doi: [10.32631/pb.2023.2.01](https://doi.org/10.32631/pb.2023.2.01).
- [5] Gorelov, D.M., & Kornievskiy, O.A. (2015). [Volunteer movement: World experience and Ukrainian civic practices](#). Kyiv: NISD.
- [6] Klimenko, N.O. (2018). *Volunteering as a means of forming the spiritual culture of youth: Informational and methodological materials*. Kyiv: KZ KOR "Kyiv Regional Library for Youth".
- [7] Kornievskiy, O.A. (Ed.). (2015). [Development of civil society in Ukraine](#). Kyiv: National Institute of Strategic Research.
- [8] Kudrya, M. (2018). [The political component of the activity of the volunteer movement as an institution of civil society in Ukraine](#). *Bulletin of Lviv University. Series: Philosopher-Political Scientist Studio*, 16, 151-155.
- [9] Law of Ukraine No. 3236-VI "On Volunteering". (2011, April). Retrieved from <https://zakon.rada.gov.ua/laws/show/3236-17#Text>.
- [10] Law of Ukraine No. 4572-VI "On Public Associations". (2012, March). Retrieved from <https://www.wipo.int/wipolex/ru/legislation/details/18426>.
- [11] Law of Ukraine No. 5073-VI "On Charitable Activities and Charitable Organizations". (2012, July). Retrieved from <https://zakon.rada.gov.ua/laws/show/5073-17#Text>.
- [12] Matiychyk, A.V. (2016). Volunteer activity as a determinant of the development of civil society. *Grani*, 19(8), 100-107. doi: [10.15421/171658](https://doi.org/10.15421/171658).
- [13] Matyash, M. (2017). *Ukrainian volunteering is a unique phenomenon. We owe him our sovereignty*. Retrieved from <https://www.ukrinform.ua/rubric-society/2324579-ukrainske-volonterstvo-avise-unikalne-jomu-zavdacuemo-suverenitetom.html>.
- [14] Melnychuk, H. (2018). The role of volunteering in strengthening civil society in Ukraine (1990s – the first half of the 21st century). *Current Issues of Social Sciences and History of Medicine*, 2, 52-56. doi: [10.24061/2411-6181.2.2018.28](https://doi.org/10.24061/2411-6181.2.2018.28).
- [15] Molodychenko, V.V., & Molodychenko, N.A. (2017). [Volunteering as a determinant of national-patriotic personality education](#). In *The phenomenon of volunteerism in the discourses and narratives of history and culture of the late 20th and early 21st centuries: Theses of the reports of the international scientific and practical conference* (pp. 51-52). Dnipro: Dnipro National University of Railway Transport.
- [16] Nagornyuk, O. (2020). [Volunteering as a practice of civil society](#). Retrieved from <https://uplan.org.ua/analytics/volonterstvo-ia-praktyka-hromadianskoho-suspilstva/>.
- [17] National Institute for Strategic Studies. (2021). [The state of development of civil society in Ukraine: The path for 30 years and key aspects of 2021](#). Kyiv: NISD.
- [18] Pankova, O.V., Kasperovych, O.Yu., & Ishchenko, O.V. (2016). [The development of volunteering in Ukraine as a manifestation of the activation of social resources of civil society: Specifics, problems and prospects](#). *Ukrainian Society*, 2(57), 25-40.
- [19] Strepko, M. (2018). [Volunteer activity as a way of forming a new culture of civil society](#). *Bulletin of Taras Shevchenko LNU*, 6(320), 89-97.
- [20] Taran, M. (2023b). Forms of interaction between volunteers and law enforcement agencies at the initial stage of ATO (2014-2015). *Gileia: Scientific Bulletin*, 183(4), 43-50.
- [21] Taran, M.V. (2023a). [Peculiarities of the activity of volunteer organizations of Ukraine in providing assistance to internally displaced persons](#). In *The 9th international scientific and practical conference "Modern problems of science, education and society"* (pp. 1059-1065). Kyiv.

- [22] Ukrainian civil society under the war. A report based on the findings of the study. (2023). Retrieved from <https://ednannia.ua/attachments/article/12447/Ukrainian%20civil%20society%20under%20the%20war.pdf>.
- [23] Vashkovich, V.V., Vasylenko, O.Yu., Karabin, T.O., Lazur, Y.V., Manzyuk, V.V., & Roskhaniuk, V.M. (2022). *Volunteer's manual*. Odesa: Helvetica Publishing House.
- [24] Zhekalo, H. (2015). *Activation of civil society after Euromaidan: State and trends of changes*. *Bulletin of the Carpathian University. Political Science*, 1(9), 15-19.
- [25] Zhuzha, L.O. (2019). *Modification of civil society functions under the influence of the anti-terrorist operation in Ukraine*. *Modern Society: Political Sciences, Sociological Sciences, Cultural Sciences*, 1(11), 77-87.
- [26] 77% of public organisations help the Armed Forces, but strive to gradually return to the main areas of activity – the results of the study. (2023). Retrieved from <https://cs.detector.media/community/texts/185203/2023-02-21-77-gromadskykh-organizatsiy-dopomagayut-zsu-ale-pragnut-postupovo-povertatysya-do-osnovnykh-napryamiv-diyalnosti-rezultaty-doslidzhennya/>.

Український волонтерський рух та розвиток громадянського суспільства (2014 – лютий 2022)

Максим Таран

Аспірант

Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0009-0008-5002-6192>

Анотація. Волонтерський рух, сформувавшись після Революції гідності, відіграв значну роль в трансформації суспільно-політичних процесів в Україні, а також у відбитті російської агресії з 2014 р. та соціальному захисті населення, зокрема внутрішньо переміщених осіб, разом з тим його значення у становленні громадянського суспільства в Україні є недостатньо вивченим. Метою роботи було висвітлення ролі волонтерського руху в становленні громадянського суспільства в Україні, починаючи з Революції гідності, коли відбулися кардинальні зміни в різноманітних сферах життя українського соціуму, та до початку повномасштабного вторгнення РФ на територію України. У роботі були використані наступні методи наукового пізнання: аналіз, синтез, історичний метод, а також аналіз наукових публікацій. Було встановлено, що до кінця 2013 р. волонтерський рух, незважаючи на певну підтримку з боку держави, в тому числі його законодавчого регулювання, розвивався досить повільно, як і інститут громадянського суспільства в Україні. Було виявлено, що події Євромайдану та Революції гідності призвели до трансформаційних процесів в суспільно-політичному та соціально-економічному житті країни, остаточно сформувавши інститут громадянського суспільства, і мали вирішальний вплив на піднесення волонтерського руху в Україні. Було досліджено процес масового створення громадських об'єднань, в тому числі благодійних і волонтерських організацій. Було узагальнено участь представників волонтерського руху у всебічній підтримці учасників антитерористичної операції та цивільного населення, зокрема внутрішньо переміщених осіб, захисту довкілля, здійснення благодійної діяльності та просвітницької роботи. Практична цінність роботи полягає в тому, що автор комплексно дослідив роль волонтерського руху у встановленні та розвитку громадянського суспільства в Україні, а результати роботи можуть бути використані громадськими об'єднаннями в організації волонтерської роботи.

Ключові слова: антитерористична операція; благодійна діяльність; внутрішньо переміщені особи; волонтерські організації; громадянське суспільство; громадські об'єднання; Революція гідності



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 9, No. 2, 29-41

Article's History: Received: 15.12.2023 Revised: 03.05.2024 Accepted: 28.06.2024

UDC 355.422(470+571):(477):002.1-048.62(477+438)(045)

DOI: 10.69587/sdc/2.2024.29

Events of the Russian-Ukrainian war (2022-2024): Ukrainian and Polish experience of documentation and representation

Liudmyla Bozhuk*

PhD in Historical Sciences, Associate Professor
National Aviation University
03058, 1 Liubomyr Huzar Ave., Kyiv, Ukraine
<https://orcid.org/0000-0003-3883-5997>

Lesia Khaletska

PhD in Historical Sciences, Associate Professor
National Aviation University
03058, 1 Liubomyr Huzar Ave., Kyiv, Ukraine
<https://orcid.org/0000-0002-8409-2138>

Abstract. The purpose of the study was to investigate and compare the Ukrainian and Polish experiences of documenting the events of the Russian-Ukrainian war in institutional, organisational, and methodological aspects, from the standpoint of the goals of documenting and presenting the collected evidence as an important factor in the development of national identity and the preservation of historical memory. To achieve this goal, the activities of state institutions and public organisations documenting events/crimes of the Russian-Ukrainian war both in Ukraine and in the Republic of Poland were analysed. The methodological basis of the research was general scientific and special methods of studying problems, the use of which helped to achieve this goal. The use of a complex of general scientific methods: analysis and synthesis, system and functional approaches, classification and systematisation, description, explanation, and generalisation helped to outline the problem of documenting and presenting the events of the Russian-Ukrainian war in 2022-2024 by state institutions and public organisations. The problem and thematic method was used to understand the Ukrainian and Polish experiences of documenting and presenting the events of the Russian-Ukrainian war in 2022-2024. As a result of the study, it was found that both in Ukraine and in Poland, the process of documenting the events of the Russian-Ukrainian war and war crimes committed by the Russian aggressor by both state institutions and public associations is actively continuing. The dependence of the types and methods of documentation on the conditions of its implementation is clarified, and the basis of documented information is oral, written, photo, video, and film examinations. It is proved that the common goal of documenting the events/crimes of the Russian-Ukrainian war by all institutions is to create an evidence base for bringing Russian aggressors to justice by the International Criminal Court. The practical value of the scientific heritage, given the limited research in the Ukrainian scientific discourse of this topic, is a comprehensive coverage of the Ukrainian and Polish experiences of documenting and presenting the events of the Russian-Ukrainian war 2022-2024 to preserve historical memory, comprehending the experiences of the war for future generations

Keywords: Russian aggression; large-scale war; performances; archives; public organisations; Ukraine; Poland

Suggested Citation:

Bozhuk, L., & Khaletska, L. (2024). Events of the Russian-Ukrainian war (2022-2024): Ukrainian and Polish experience of documentation and representation. *Society. Document. Communication*, 9(2), 29-41. doi: 10.69587/sdc/2.2024.29.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author

Introduction

The emergence and course of wars, military conflicts, hostilities, terrorist acts, etc. are traditionally accompanied by a process of documentation. In historical retrospect, the closer such events are to the present day, the more documented they are. A distinctive feature of the first quarter of the 21st century is a significant increase in the volume of documentary evidence about military events and crimes in digital form. A striking example of the latter is the Russian-Ukrainian war, in particular its full-scale phase (2022-2024). Documenting war crimes and creating digital archives has become the goal of interested researchers, journalists, lawyers, IT specialists, other professionals, and public organisations. Notable examples of such activities include documenting human rights violations, particularly during wars, and creating digital archives by Mnemonic, a non-profit NGO that in 2014 created the Syrian archives as a rapid response project, working closely with Syrian reporters and documentation groups to preserve digital information about the Syrian conflict: images, videos, and other publications that are invaluable historical artefacts and potential evidence of human rights violations (Mnemonic, 2024). Mnemonic created the Ukrainian archive, which as of 28.02.2023 collected more than 3 million records of potential human rights violations and alleged war crimes in Ukraine after the Russian invasion (York, 2023). E. Higgins (2022), founder of Bellingcat, a non-profit project that has been researching war crimes since 2014 and, in particular, since the beginning of Russia's large-scale invasion of Ukraine, began collecting information about military events and crimes of the Russian Federation, creating an appropriate database – using the example of this organisation's activities, he described the methods of working with open sources when documenting crimes: collecting, checking, archiving videos and photos from open sources using geo-location, satellite images, reverse image search, etc. The problem of documenting international crimes committed during the Russian-Ukrainian war is reflected in the pages of the publication edited by P. Grzebyk, an Associate Professor at the University of Warsaw, a specialist in public international law, and D. Uczkiewicz, a lawyer, historian, Associate Professor of the Centre for Totalitarian Studies at the Pilecki Institute in Warsaw (Grzebyk & Uczkiewicz, 2024). In the sections of this publication, researchers and legal practitioners from Canada, Germany, Poland, Ukraine, the United Kingdom, and the USA presented the results of interdisciplinary research, views from the perspective of other post-communist states, and their own experience in documenting these crimes and prosecuting those responsible for them. In particular, the pages of the publication highlight the experience of the UN Stockholm Commission on documenting war crimes, and the activities of the Raphael Lemkin Centre for Documenting Russian Crimes in Ukraine; the ethical and methodological challenges of documenting war on the example of recordings of Ukrainian witnesses after February 24, 2022; the issue of digital evidence in investigations of Russian crimes in Ukraine is revealed.

Dr. P.R. Williams & N. Carle (2023) described in detail the development and implementation process of the Public International Law & Policy Group (PILPG) remote documentation initiatives to collect testimonies of those who suffered violence during the war in Ukraine after the invasion of the Russian Federation in February 2022. The researchers stressed the critical importance of early and sufficient documentation to bring these crimes to justice in the future. In their opinion, the importance and necessity of documentation by remote collection of evidence are conditioned by the long nature of the war, which makes it difficult to conduct thorough investigations for public documentary filmmakers, the unavailability in the first days of the war of collecting reliable witness statements compared to the use of photo and video documentation technologies, the labour intensity and logistical complexity of the process of collecting evidence from geographically dispersed Ukrainian refugees. By implementing the project "Ukrainian initiative for memorialisation and accountability" – a remote documentation programme to collect witness statements through Zoom from those who were subjected to violence during the war in Ukraine – PILPG sought to achieve a dual goal: to contribute to the historical record of events that occurred after the full-scale invasion of Ukraine, and to help prosecutors and international accountability mechanisms collect data on potential crimes that were committed during the war. Dr. P.R. Williams & N. Carle (2023) described in detail the components of the remote documentation process: from team formation and training, workflow development, indexing collected data and database creation to storing digital information, communicating with witnesses before interviews, conducting interviews using Zoom, and providing psychosocial support to both witnesses and investigators. Authors of the collective study under the general editorship of N. Otrishchenko (2024) focused on documenting the events of the war in Ukraine by interviewing witnesses – people who lived in close proximity to the front line, survived the occupation, are internally displaced persons, belong to various social and professional groups. Through interviews with researchers who recorded oral histories from the first months of the full-scale Russian invasion of Ukraine, the practice of this method of documentation is highlighted. Attention was focused on the features of documentation "in the field" based on the researchers' own experience, and the stages of documentation are described: from the development of a questionnaire to the creation of an archive of records. The paper raises the debatable question of what an all-Ukrainian archive of the Russian-Ukrainian war would look like, and whether it is worth creating a single information resource for this purpose. The paper also presents the experience of adapting to the challenges of war methodologies that were developed abroad and applied by Ukrainian teams before a full-scale war. At the centre of the researchers' discussion is a complex question about the future fate of recorded evidence, under what conditions access to the archive can be opened, and what is

the future of oral histories as a historical source. These and other questions create a field for future scientific research. L. Bozhuk & L. Khaletska (2024) analysed and highlighted the activities of state regional archives of Ukraine during the Russian-Ukrainian war (2022-2024) on documenting evidence of war events, war crimes committed by Russian aggressors, presenting documentary evidence on the websites of archives of Ukraine, and revealed the areas and significance of assistance from Polish partners in solving important issues of preserving Ukrainian historical and cultural heritage. The topic of documenting war crimes during the ongoing war occupies an important place in the scientific literature. However, according to the study by K. Kysliuk (2024), papers in the international scientometric databases Scopus and Web of Science (as of the beginning of November 2023), the subject of which can be attributed to the field of culture (and, accordingly, to the issue under study), are quantitatively insignificant. The above determines the relevance of studying the Ukrainian and Polish experience of documenting and presenting the events of the Russian-Ukrainian war (2022-2024). The purpose of the study was to investigate and compare the Ukrainian and Polish experience of documenting war events in institutional, organisational, and methodological aspects, from the standpoint of the goals of documenting and presenting the collected evidence as an important factor in the development of national identity and the preservation of historical memory. In accordance with the goal, the objectives of the study were defined: to find out which institutions in Ukraine and Poland are engaged in documenting the testimony of witnesses to war events and war crimes committed by the Russian aggressor; for what purpose and how the documentation process is organised; to investigate the methods and process of documenting; to get acquainted with the ways of presenting documentary evidence by the institutions under study.

Materials and Methods

In accordance with the topic and purpose of the study, the objects of research were identified as state archival services of Ukraine, state and public institutions of Ukraine and Poland, engaged in documenting and creating archives/databases of events and crimes of the Russian-Ukrainian war. The choice of state and public institutions of Poland as objects of research was conditioned by the movement of a significant number of Ukrainian citizens under the protection of the Polish Republic in the period after February 24, 2022, close interstate relations and cooperation of countries, including institutions that document the events of the Russian-Ukrainian war. The stages of the study were: investigation of documentation activities, creation of archives and databases of state and public institutions of Ukraine and Poland; determination of criteria for conducting a comparative analysis of this activity, namely: the purpose of documentation, type of documentation, types

of documentary sources, availability and method of representation of documented evidence; implementation of comparative analysis and classification according to certain criteria; generalisation of information obtained as a result of the study and formulation of conclusions and recommendations on the application of the studied practices of documentation and representation of documented evidence. A set of general scientific methods was used in the study. Analysis and synthesis were used, in particular, to determine the purpose, objectives of the study, the expected results, and to collect and process the information accumulated in the course of the research. The information presented on the websites of these institutions was analysed, including their activities in documenting the events of the Russian-Ukrainian war, and the presentation of the results of these activities to the public. The source base of the study was the websites of state institutions and public organisations, namely: state regional archives of Ukraine, Prosecutor General's offices of Ukraine and Poland, the Ministry of Culture and Information Policy of Ukraine (MCIP), the Rafal Lemkin Centre for Documenting Russian Crimes in Ukraine (Lemkin Centre), etc. The targeted selection of websites of these organisations was conditioned by the hypothesis expressed about the comparability of their activities for documenting and further presenting documented events/crimes of the Russian-Ukrainian war, which was mainly confirmed as a result of the study. The analysis of the activities of certain institutions for documenting the events/crimes of the Russian-Ukrainian war was reflected in the classification tables and created a basis for comparing the Ukrainian and Polish experiences of documenting the events of the Russian-Ukrainian war in institutional, organisational, methodological aspects, in terms of goals, types of documentation, representation of the collected evidence. The systematised results of the comparison determined the dependence of types and methods of documentation on the conditions of its implementation and revealed trends in the further progress of Ukrainian institutions in documenting and presenting documented evidence. The selection of literature necessary for completing the paper and the search for relevant sources was carried out using the bibliographic method.

Results

All the data provided relate to events/crimes during the large-scale Russian-Ukrainian war (2022-2024). It was found that both in Ukraine and Poland, state institutions and public associations are engaged in documenting the testimony of witnesses to the events of the Russian-Ukrainian war and war crimes committed by the Russian aggressor, in particular, shown in Figure 1. The activities of the institutions under study are characterised by the coincidence of one of the goals of documentation – the creation of an evidence base for the future consideration of crimes of Russian troops in Ukraine in the Ukrainian national and international courts (Table 1).

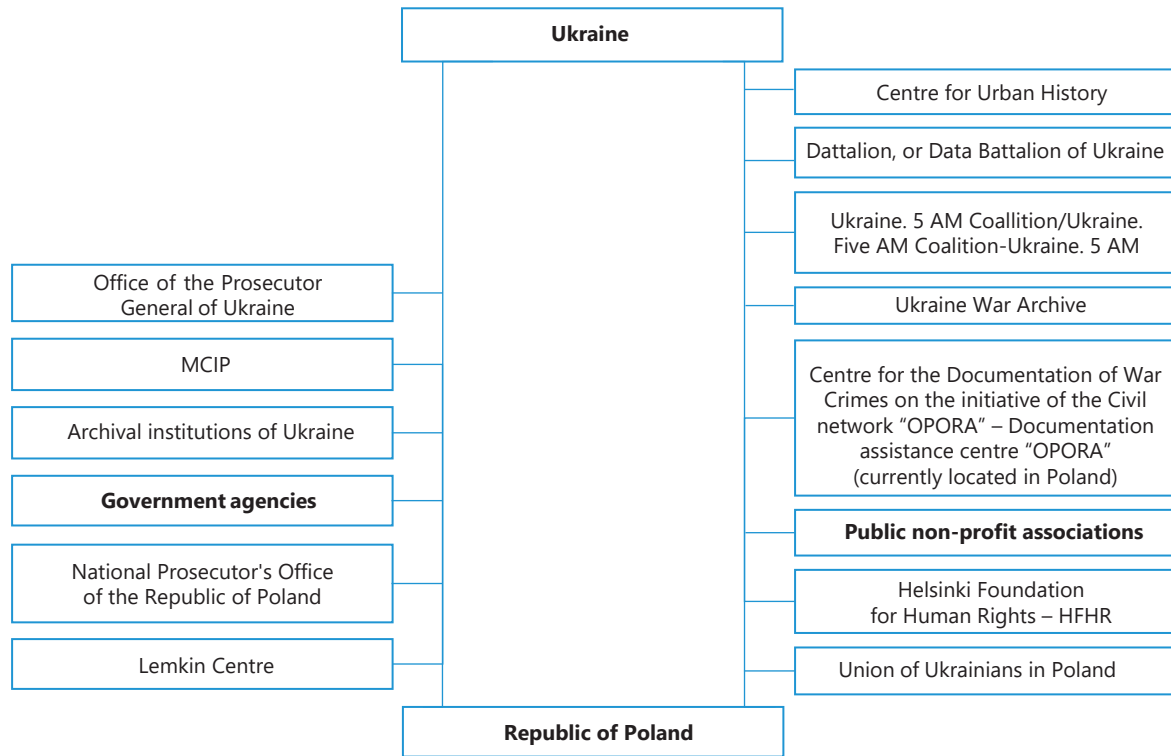


Figure 1. Institutional composition of Ukrainian

and Polish institutions that document events/crimes of the Russian-Ukrainian war (2022-2024)

Source: developed by the authors

Table 1. Purpose of collecting documentary evidence about military events and crimes of the Russian military in Ukraine

Purpose of documentation Institution	Bringing to criminal responsibility those responsible for the crimes committed	Preserving the historical memory of the war	Database for researchers
Office of the Prosecutor General of Ukraine	+	-	-
MCIP	-	+	+
Archival institutions of Ukraine		+	+
National Prosecutor's Office of the Republic of Poland	+	-	-
Lemkin Centre	+	+	+
Centre for Urban History	+	+	+
Dattalion	+	-	+
Ukraine. 5 AM	+	-	-
Ukraine War Archive	+	+	+
Documentation assistance centre "OPORA"	+	-	-
HFHR (Poland)	+	-	-

Source: developed by the authors based on the study of the activities of state and public institutions of Ukraine and Poland to document the events/crimes of Russian troops in Ukraine (2022-2024) (according to the data provided on the websites)

Office of the Prosecutor General of Ukraine (Documenting the war crimes..., 2024) and the National Prosecutor's Office of the Republic of Poland (Information on the actions..., 2022) have the same and common purpose – to collect and record evidence of crimes committed by the

Russian military in Ukraine to bring to criminal responsibility those responsible for their commission in the International Criminal Court in the Hague and in the special tribunal after its establishment. Accordingly, until court decisions and sentences are passed, the collected evidence will be

inaccessible to the general public. Along the way, it should be noted that on March 25, 2022 in Ukraine, Prosecutor General of Ukraine Iryna Venediktova, Prosecutor General of Lithuania Nida Grunskiene, Prosecutor General Zbigniew Zebro, and First Deputy Prosecutor General – National Prosecutor Dariusz Barski signed an agreement on the creation of a joint investigation team between Ukraine, Lithuania, and Poland regarding Russia's aggression against Ukraine. The creation of the Ukrainian-Polish-Lithuanian investigation team will be particularly useful for identifying, recording and detailing evidence of war crimes occurring on the territory of Ukraine and will allow direct exchange of evidence and lead to simplification of legal procedures (Prosecutor General signed..., 2022). The purpose of the investigation is to quickly obtain evidence of war crimes committed by the armed forces of the aggressor on the territory of Ukraine. The activities of the investigation are primarily aimed at collecting and recording in procedural form the testimony of witnesses to war crimes, identifying persons who were injured, recording photo and film materials documenting war crimes (Chief Prosecutor of the International Criminal Court..., 2022). Despite the common goal, the prosecutor's offices of both countries have differences in the organisation of the

process of documenting evidence. On the website and in the mobile application from the Office of the Prosecutor General of Ukraine for the purpose of fixing a war crime, a questionnaire is posted, which can be filled out and sent by victims or witnesses, and an opportunity for them to upload photos or videos (remote documentation). The National Prosecutor's Office of Poland has asked Ukrainian refugees to appear to give evidence and hand over evidence of crimes (direct documentation). The investigation is interviewing witnesses and seizing records confirming the commission of war crimes. If the readings recorded on digital media are found, they will be copied, and the equipment (for example, smartphones) will be returned to the person giving the testimony. Only persons whose mental and physical condition allows this to be done are questioned, and only with their consent. The participation of an expert psychologist is also provided. Witnesses can also contact the round-the-clock police hotline, which operates in Ukrainian, or any local prosecutor's office (Mamon, 2022). There is no representation of the collected evidence by the prosecutor's office, which is conditioned by the purpose of documentation. The specifics of documenting Russian military crimes by the prosecutor's offices of Ukraine and Poland are shown in Table 2.

Table 2. Documenting and presenting evidence of events/crimes of the Russian-Ukrainian war (2022-2024)

Institution	Type of documentation		Document type			Representation	
	remote	direct	oral (audio document)/ written testimony	photo document	video and film document	available	postponed
Office of the Prosecutor General of Ukraine	+	-	+	+	+		+
MCIP	+	-	+	+	+	+	-
Archival institutions of Ukraine	+	+	+	+	+	+	+
National Prosecutor's Office of the Republic of Poland	-	+	+	+	+	-	+
Lemkin Centre	+	+	+	+	+	+	
Centre for Urban History	+	+	+	+	+	+	
Dattalion	+	+	+	+	+	+	
Ukraine. 5 AM	+	-	+	-	-	-	+
Ukraine War Archive	+	+	+	+	+		+
HFHR (Poland)	+	+	+	-	+	-	+
Documentation assistance centre "OPORA"	-	+	+	-	-	+	+

Source: developed by the authors based on the study of the activities of state and public institutions of Ukraine and Poland to document the events/crimes of Russian troops in Ukraine (2022-2024) (according to the data provided on the websites)

The activity of the MCIP can be compared with the activity of the state institutions of Poland in terms of the purpose of documentation, and in part the types of documents that can be viewed on the platform War Evidence (Projects, 2024). In order to cover the events of the war, the life of ordinary Ukrainians in the harsh conditions of martial law, and record the losses caused by Russian aggressors to

Ukraine, several projects were created and presented on the Ministry's website, in particular: "Svidok", "War Up Close" (Projects, 2024).

The issue of documentation by the state regional archives of Ukraine of the events of the Russian-Ukrainian war (2022-2024) as of July 1, 2024 was investigated by analysing their websites (Regional State Archives, 2024).

Analysis testified that according to the information posted on the archives' websites about the documents accepted for preservation and the scope of documents presented for users' review, the results of work on documenting the events of the Russian-Ukrainian war are most widely

presented on the websites of state archives of Zaporizhzhia, Kyiv, Poltava, Sumy, Ternopil, Kherson, Chernivtsi, and Chernihiv oblasts. The results of the study on the state of documentation and representation of war events are presented in summary Table 3.

Table 3. Documentation and representation of military events by regional state archives of Ukraine

No.	Criteria Oblast	Creation of archive collections	Archival description	Online exhibitions	Appeal to offices of origin
1	Vinnitsia	-	-	-	-
2	Volyn	+	-	-	+
3	Dnipropetrovsk	-	-	-	-
4	Donetsk	-	-	+	-
5	Zhytomyr	-	-	-	-
6	Zakarpattia	-	-	-	-
7	Zaporizhzhia	+	+	+	+
8	Ivano-Frankivsk	-	-	-	-
9	Kyiv	+	+	+	+
10	Kirovohrad	+	+	-	+
11	Luhansk	+	-	-	-
12	Lviv	+	-	-	+
13	Mykolaiv	-	-	-	-
14	Odesa	-	-	-	+
15	Poltava	+	+	+	-
16	Rivne	+	+	-	-
17	Sumy	+	+	+	-
18	Ternopil	+	+	+	+
19	Kharkiv	-	-	-	-
20	Kherson	+	+	+	-
21	Khmelnitskyi	-	-	-	-
22	Cherkasy	-	-	-	+
23	Chernivtsi	+	+	+	-
24	Chernihiv	+	+	+	-

Source: developed by the authors based on the study of the Regional State Archives (2024) of Ukraine as of 01.07.2024

Archival institutions of Ukraine have a common goal of documentation with the studied state institutions of Poland. However, they cannot be compared with the corresponding Polish archival institutions, since the latter are not faced with the task of documenting the events of the Russian-Ukrainian war. Meanwhile, archives differ from other institutions in the specifics of their activities to collect documentary evidence about these events. Ukrainian archivists responded to the appeal of the management of the State Archival Service of Ukraine to start initiative documentation of military events and the formation of archival collections.

It is worth noting that the initiative documentation of archives of events of a large-scale war is a component of completing archival funds. Currently, these funds are only at the stage of development, since documentary sources

require an expert examination of the value, description, clarification, and consideration of issues of ownership of NAF documents. Therefore, documents reflecting the events of the Russian-Ukrainian war are only partially presented on the websites of the state regional archives of Ukraine in the form of brief reporting information indicating the number of collected and processed storage units published in online exhibitions.

Although the Lemkin Centre (Raphael Lemkin Centre..., 2024) and the Centre for Urban History (2024) belong to different institutional categories (Fig. 1), but they are quite comparable in terms of goals, methods of documenting events/crimes of the Russian-Ukrainian war, types of documentation, types of documents collected, and sometimes in ways of presenting the collected documentary evidence (see Tables 1, 2, 4).

Table 4. Ways to present documented evidence of events/crimes of the Russian-Ukrainian war (2022-2024)

Institution	Internet platforms (website, instant messengers, social networks)	Scientific and educational events	Art events	Analytical reports	Documentary exhibitions
Ministry of Culture and Information Policy of Ukraine	+	+	+	-	-
Archival institutions of Ukraine	+	-	-	-	+
Lemkin Centre	+	+	+	+	+
Centre for Urban History	+	+	-	+	-
Dattalion	+	+	-	-	+
"Ukraine 5 AM"	+	-	-	-	-
Ukraine War Archive	+	+	+	-	+
Documentation assistance centre "OPORA"	+	-	-	+	-

Source: compiled by the authors

Notably, the Lemkin Centre was established in Warsaw on 26 February, 2022. The Pilecki Institute (Warsaw) is a government organisation with extensive experience in collecting, preserving, and processing testimonies of victims of totalitarian regimes of the 20th century. The Centre for Urban History does not have such experience, but actively acquires it, relying on cooperation with international partners, including representatives of the Institute of philosophy and sociology of the Polish Academy of Sciences, the Polish Society of Oral History, the University of St Andrews (Great Britain), the Centre for Modern and Digital History of the University of Luxembourg, the Centre for the Study of Modern History in Hamburg (Germany), Ludwig-Maximilian University in Munich (Germany), etc. In addition, the Centre for Urban History conducts methodological seminars and presentations on the topic of documentation, in particular, with invited foreign specialists (for example, "Confrontation with violence: when and why to document the experiences of war", German Historical Institute in Warsaw, 27.5.2022; "Who and why collects evidence about the war in Ukraine?", Kyiv School of Economics, 22.8.2022; "Narrating the War Everydayness", Harriman Institute at Columbia University, New York, 11.10.2022; "The war gave everyone a role-what's yours?": Documenting stories Amid Crisis", MacMillan Centre for International and Area Studies, Yale University, New Haven, 12.12.2022, etc.). Attention is drawn to the significant difference in the representation of the collected evidence by the Lemkin Centre and the Centre for Urban History. After processing (translation, digitisation, registration, and anonymisation), the evidence collected by the Lemkin Centre becomes available on the "Records of terror" platform (Records of terror, 2024). Full access to the database is available only in the library of the Piletsky Institute. Forms of dissemination of the collected evidence are publications in the press, films, exhibitions, performances, debates, conferences. Art and scientific and educational events are advertised on the website of the Piletsky Institute. The website also contains a report

of the Lemkin Centre on sexual violence against Ukrainian women by the Russian occupation forces (Report..., 2024), prepared based on the field studies in the temporarily occupied territories during April 2022 – February 2024. Research of the Centre for Urban History "Documenting the experience" (Documenting the experience..., 2024) consists of several research projects: "24.02.22, 5 AM: Evidence from the war", "Visual documentation of the war", "Telegram archive of the war", "Diaries and dreams of war", "We investigate the collection, preservation, analysis, and publication of Ukrainian evidence of the war". The latter began in January 2024 and marked the transition to a new stage in documenting the collected evidence – the development of a digital environment for processing, preserving, and potential access to digital oral evidence of war in collaboration with the Institute of Philosophy and Sociology of the Polish Academy of Sciences and the Luxembourg Centre for Contemporary and Digital History – "Research on the collection, preservation, analysis, and publication of Ukrainian evidence of war 2022 (U-CORE)" (We investigate the collection..., 2024). The purpose of U-CORE, in particular, is to create a digital environment for a transnational database of war evidence, contribute to the establishment of a culture of memory in Ukraine, create (with the participation of witnesses) a documentary, graphic novel, and organise other activities at the intersection of public history, science, and art. In addition to the planned forms of representation of the collected documentary evidence, a Telegram channel has been created (Telegram archive of the war. Telegram channel, 2024) and the blog "Telegram archive of the war" (Telegram archive of the war. Blog, 2024). Direct access to archival materials is currently impossible due to security risks and sensitive content. Currently, the archive team is working on access formats depending on the needs and level of data sensitivity, as indicated in the first message (18.06.2024) in the Telegram channel. The blog already has archived materials on several topics. Work on the blog content is ongoing. A report on the two-year

results of the Telegram archive of war project is available to the general public (Avramenko *et al.*, 2024).

Describing the activities of public organisations of Ukraine to document and publish the military events of 2022–2024, it should be noted right away that from the very beginning it was actually an initiative of the organisations themselves, individual public activists, and volunteers. Some of them have already had some experience collecting photo and video evidence of war crimes committed by Russia in Ukraine since 2014. However, not all materials captured or collected in a certain way, which are stored in different ways, have different degrees of access, can be considered as having archival value and are important for the preservation of historical memory and have legal force so that in the future they can be attached to cases in the International Criminal Court.

The Ukrainian Helsinki Human Rights Union (UHHRU) was one of the first NGOs to start documenting Russia's crimes against Ukraine as part of the global Tribunal for Putin initiative with the start of a full-scale Russian invasion on February 24, 2022. As an association of human rights organisations, UHHRU constantly monitors the situation, collects evidence and documents events that show signs of war crimes and crimes against humanity committed by Russian aggressors under the Rome Statute of the International Criminal Court in all regions of Ukraine, including the Autonomous Republic of Crimea. Active work is being carried out at the international level to use the existing mechanisms in the UN, the Council of Europe, the OSCE, the EU, and the International Criminal Court to stop these violations (The tribunal for Putin, 2024). It is possible to report crimes in the context of Russia's war against Ukraine by filling out a questionnaire on the project's website, and there is a separate form for reporting crimes committed in Mariupol. After summarising the received materials, the processed information is systematically published on the UHHRU website. For example, the "Overview of documented war crimes for January 2024" states that since the beginning of the full-scale Russian invasion of Ukraine and as of January 2024, the total number of episodes involving human losses or human rights violations on the territory of Ukraine has increased and amounted to 42,860 (Overview of documented war crimes..., 2024). The collected documentation will be used in future trials against Russian war criminals.

Active is carried out by participants of the DocudaysUA project "Archive of war" – an information non-profit platform for digitising and preserving eyewitness accounts of Russian war crimes since the beginning of the full-scale Russian invasion of Ukraine. Notably, the project is a partner platform for storing digital data, a single register of materials related to the war. The Docudays UA strategy contributed to the inclusion of a number of public organisations that transmit their own materials to the archive, in particular: UHHRU, Kharkiv Human Rights Group, Centre for Civil Liberties, Lviv Centre for Urban History, and government bodies – the Office of the Prosecutor General, the Government Commissioner for the European Court of Human Rights.

The subject of information resources accumulated in the "War Archive" is quite wide. In addition to testimonies about Russian war crimes, documentary materials are collected about the daily life of ordinary Ukrainians, destruction, interviews are conducted with war witnesses, volunteers, OSINT investigations are accumulated, etc. Currently, the platform contains about 20 million media files, 34 thousand materials collected by hand and received from partners, more than 2 thousand interviews, and about 6.5 million files from open sources. The content of more than 2,800 Telegram channels was archived and 36,000 events and potential war crimes were recorded (Project DocudaysUA, 2024). For security and ethical reasons, while military operations continue, project coordinators and participants have restricted access to the collected resource. The Docudays UA team is actively working to spread truthful information about the events of the Russian-Ukrainian war among the world community using audiovisual media. For example, as part of the 21st Docudays UA International Human Rights Documentary Film Festival, which took place in Kyiv from 31 May to 6 June 2024 under the slogan "10 Years of a Three-Day War That Lasts Three Centuries", the organisation presented, among other things, the documentary "Witnesses. Captivity kills". The characters of the film are Ukrainian prisoners of war, participants in the defence of Mariupol and their relatives, who in their testimony reveal the truth about the war crimes of Russians, thereby debunking the disinformation that Russia uses in the war against Ukraine.

Coalition "Ukraine. 5 AM" is a union of human rights organisations whose tasks are: documenting war crimes, crimes against humanity, informing the public about them in Ukraine and abroad, protecting war victims through the use of national and international justice mechanisms (Ukraine. 5 AM, 2024). Anyone who witnessed the incident can report crimes by writing a corresponding letter to the coalition. The coalition does not carry out independent work on processing and publishing the information received, and organising and conducting artistic, informational, educational, and educational events.

On 27 February 2022, the volunteer project DATTALION – Ukrainian Data Battalion – was launched. DATTALION is an open, independent, free database of videos from the hottest spots in Ukraine, which are used by most Western media (Fox News, the time, NBC, etc.) related to various events and plots of the war. It is important for users that the materials of the information base are collected from various open sources in electronic folders, and their content is divided into "official", "reliable", and "verified". Collections of videos and photos are formed by date, which allows users to find and view events of a certain day recorded in different regions of Ukraine. Besides, DATTALION offers a database of testimonies from more than 220 verified eyewitnesses who survived the horrors of the Russian invasion, occupation, and exile. Information video and photo materials collected by women volunteers from open official sources (State Emergency Service, the President of Ukraine,

government agencies, etc.) are published with explanations in English, thus forming a database, in fact the largest archive of photos and videos, and evidence of the war. In order to present to the international community the true history of the events of the Russian-Ukrainian war, reveal the truth about the genocide of Ukrainians and receive the support and assistance of partner countries, the DATTALION team organised a series of exhibitions of photographs from Ukrainian fronts, frontline cities, created by photojournalists and ordinary Ukrainians, in particular, in the United States, the Hague, and other European cities. Currently, the DATTALION database, published on its own website, contains 6,100+ videos, 40,000+ photos, 220+ eyewitnesses, 50,000+ monthly visitors (DATTALION..., 2024).

Union of Ukrainians in Poland (Union of Ukrainians..., 2024) posted information on its website about the creation of the Lemkin Centre by the Piletsky Institute, and its involvement in this project, but this organisation does not carry out independent activities of this nature. After the full-scale Russian aggression of the HFHR (Documenting war crimes..., 2022) monitors the observance of human rights on the Polish-Ukrainian border, provides assistance to Ukrainian colleagues, and collects refugee testimonies. The collected documentation can be used in international and national courts. The collected facts are carefully checked and systematised according to the appropriate forms. Various methods of documenting crimes are used: interviewing survivors according to a specific scenario; checking and recording information available in open sources (e.g., the Internet). The interview is conducted according to the form and requirements of the International Criminal Court.

Since 26 June 2022, the Centre for Assistance in Documenting Russian War Crimes (Centre for Assistance..., 2024) has been operating in Warsaw, initiated by the "OPORA" civil network (Ukrainians who worked in the OPORA and came to Poland due to the circumstances of the war). The centre conducts interviews with refugees on the following points: place of collection of evidence; typical profile of the witness; territorial affiliation of the respondents; types of war crimes (destruction or damage to civilian and critical infrastructure; eyewitness accounts of events during the occupation; cases of illegal detention and torture; war crimes against children; war crimes during evacuation, filtration). The methodology of the centre provides for interviewing adult witnesses, but it is possible to allow the presence of children who can supplement the testimony of parents (guardians) at their request and with their permission. The information collected can be used in future lawsuits. The forms of representation of the collected evidence are group analyses of interviews conducted by the centre, and a map of the regions of Ukraine presented on the website indicating the total number of detected crimes and the number and percentage of crimes by type.

Discussion

The problem of the Russian-Ukrainian war is multifaceted, which requires its solution in scientific research and

open discussions. For Ukraine, the war experience of other countries is interesting and informative, in particular, in terms of recording and publicising war events/crimes. Therefore, the study and analysis of the experience of EU countries, in particular, Poland (state institutions, public organisations) in documenting war events and forming a war archive, implementing the memory policy, which has a continuity since the Second World War, is extremely important for Ukraine.

As of 2024, there are no generalising and comparative studies in Ukrainian historiography that would highlight the problems of Ukrainian and Polish experiences in documenting and presenting the events of the ongoing war in Ukraine caused by the Russian invasion. The characteristic features of the presented scientific searches were the complexity in the approach to the selection of research objects, the allocation of common and distinctive features in their activities for collecting and publishing documentary evidence in accordance with the developed criteria. Available scientific publications address certain aspects of documenting events/crimes of war that do not fully cover the problem put up for discussion. Archivists, historians, and museum workers were among the first to discuss and research this issue. The researchers paid considerable attention, first of all, to the loss of the nation's cultural values, which were caused in various ways, emphasising that in the context of Russia's armed aggression against Ukraine, Ukrainian archives, libraries, and museums, as institutions of social memory, became "the object and subject of a confessional war". R. Hula *et al.* (2022) presented a view of the consensual war as a component of information warfare, which aims to destroy the cultural and national identity of the population of the victim country by the aggressor country, impose their worldview, and establish Russian (imperial) ideology in the occupied territories. G. Zadorozhny (2021) and M. Ostapenko (2022) analysed the concept of "consensual war", established causal relationships between the object of consensual war – the change of consciousness of the enemy's population, the transformation of its value (national) orientations – and the actions of Russian aggressors against objects of Ukrainian national and cultural heritage: the merciless destruction of educational institutions, archives, museums, libraries, cultural centres – institutions whose fundamental functions are the preservation of historical memory, the development of national consciousness, national identity. The problems of protecting and saving cultural objects, in particular archival collections, museum and library collections, as a factor in preserving the national cultural heritage for the next generations, are addressed by O. Tur *et al.* (2023). Researchers, focusing on the crimes of Russians against cultural property, stressed the importance of documenting such crimes, investigating them, and bringing perpetrators to justice. On the other hand, it was concluded that in the conditions of war, in order to ensure the preservation and dissemination of knowledge about the national cultural heritage, the priority task for modern archives, libraries, and museums is to digitise their collections. Evidently, the researchers have

focused on the issues of preserving cultural objects as material, ignoring the problem of documenting evidence as an intangible heritage.

In the context of this research, a special role, according to the Ukrainian historian and archivist M. Paliienko (2022), belongs to archival institutions "due to their informational, administrative, operational, historical, cultural, and scientific value". The researcher notes that the enemy not only destroys archival premises, but also takes out valuable archival funds from the archives of the occupied territories to use the information available to falsify history, conduct an information war against Ukraine. Continuing to study the international and Ukrainian experience of archives' response in emergency situations, in particular in war conditions, regarding documentary heritage (both in terms of preservation and in terms of documenting war events, creating archival collections that will be part of the national archival fund (NAF), M. Paliienko (2024) emphasises the need to develop priority response plans, considering international experience, combining the efforts of state authorities at both central and local levels, military, cultural figures, and scientists. The researcher focuses on the special role of archives as institutions of social memory in the preservation and protection of documentary heritage and archivists who are ready to act professionally in emergency conditions of war, armed with "modern technologies for storing, preserving, restoring, and digitising documents with various information carriers". Thus, the object of research is only archival institutions and their activities, in particular, on documenting war events, which corresponds to the priority tasks of the State Archival Service of Ukraine for 2024 – "replenishment of archival funds with electronic information resources, and documents created through initiative documentation of wartime events and the recovery period, in particular, through interaction with the creators of such collections" (About the work..., 2024).

The practical aspects and specific features of the interaction between the archive and sources of acquisition in the conditions of war were considered by T. Yemelianova & V. Pokliatska (2023). Investigating the influence of the Russian-Ukrainian war on the acquisition technology and analysing the practical experience of the Central State Audiovisual and Electronic Archive for the development of audiovisual collections, archivists-practitioners focused on the implementation of the archive's initiative documentation of events and consequences of the war as an "important component of the acquisition process". Consequently, the researchers pointed to the search by the archive for new sources of NAF recruitment for future scientific research and preservation of historical memory, which encourages the appeal and use of information from open sources – social networks, Telegram channels, etc., that is, the topic submitted for consideration is revealed based on the activities of a particular archival institution.

The subject of discussion among scientists was oral historical evidence as a component of documenting war events, an important source base for research, and part

of the national archival heritage. Oral eyewitness accounts are collected by numerous researchers both in Ukraine and abroad, so the issues of processing and proper archiving and storage of oral historical documentation heritage are of great interest to researchers from different countries (Khanenko-Friesen, 2024).

With the beginning of the Russian full-scale invasion of Ukraine on February 24, 2022, Polish and Ukrainian scientists and public figures mainly focused on the problems of Polish-Ukrainian relations (damage and restoration caused by the aggressor, migration and demographic losses, health consequences of the war, the impact of the war on culture and art, changes in social structures, research of battle sites and graves of conflict victims, which was reflected during the 7th international scientific conference "The face of war. Social consequences of wars" (2023, June 1-2). A wide range of issues of Ukrainian-Polish relations in the context of the Russian invasion of Ukraine (solidarity, cooperation, including scientific, assistance to Ukrainian refugees, etc.), including issues of Polish-Ukrainian archival cooperation before and after the Russian aggression against Ukraine, documentation and research of war crimes became the subject of discussion "Polish-Ukrainian Relations in the Context of Russian Aggression against Ukraine: Historical and Contemporary Contexts" (2024) to a lesser extent, various aspects of documenting the events of the war under study, exchange of experience with the collected materials, their further archiving and representation of the processed information resource at international conferences (Paliienko, 2024; Protection of cultural heritage..., 2024), seminars (CAAEA..., 2023), international round tables (Documentation, use and dissemination of information..., 2024).

Therefore, the problem of documenting the events of the Russian-Ukrainian war, preserving the collected resource and further presenting it in the public domain by social memory institutions (archives, museums, libraries), various organisations, journalists, and individuals should become the subject of a broad scientific and public discourse from the very beginning of the large-scale invasion of the Russian Federation in Ukraine.

Conclusions

Documentation of the events of the Russian-Ukrainian war 2022-2024 in Ukraine and Poland is carried out by both government (Office of the Prosecutor General of Ukraine, MCIP, State Archival Services of Ukraine, Prosecutor's Office of the Republic of Poland, Lemkin Centre) and public organisations. According to the open information provided on the websites of the organisations under study, the common purpose of documenting the events/crimes of the Russian-Ukrainian war by all institutions is to create an evidence base for bringing Russian aggressors to justice by the International Criminal Court. Depending on the programme goals of the activities of the institutions and organisations under study, the target range of documenting events and ways to present documented evidence of events/crimes of war expands. The creation of archives, databases of

documented evidence, audiovisual materials about military events to preserve historical memory and create a source base for future scientific research is one of the declared goals for the organisations under study, except for the Prosecutor's Offices of Ukraine and the Republic of Poland, the Helsinki Foundation for Human Rights (Poland), and the documentation support centre "OPORA" (Poland). Based on the priorities of its activities, one of the important tasks of the state archives of Ukraine is to form the historical memory of everyone and the nation as a whole. Therefore, this affected the methodology and process of documentation and ways of presenting the collected materials.

Common methods of recording events and testimonies of the Russian-Ukrainian war are interviewing direct witnesses to the events, collecting information from open sources (social networks, instant messengers, mass media, websites of state institutions). Documentation takes place both directly and remotely. The basis of documented information is oral, written, photo, video, and film evidence. A special feature of the documentation support centre "OPORA", the union of human rights organisations "Ukraine. 5 AM" is the collection of oral/written evidence. The above stated goals defined the ways of presenting the collected materials, the most common of which is publication on websites, specially created online platforms, in social networks. Artistic events and analytical reports are the least used methods of representation. However, attention should be paid to the

problems of accessing online platforms (for example, War Evidence). In addition, the information posted on them has certain restrictions due to ethical or security reasons. Such a Ukrainian organisation as the Centre for Urban History is at the beginning of the development of a digital environment for processing, preserving, and potential access to digital oral evidence of war, and also has plans to expand the use of diverse artistic projects to publish the collected evidence.

The scientific originality of the study consists in identifying the possibility of comparing the studied documentation experiences and classifying them according to certain criteria (institutional, goal-setting, organisational, methodological) and presenting the collected evidence, forming recommendations for applying the considered documentation practices.

It is advisable to investigate and use the experience of the Lemkin Centre by Ukrainian government and public organisations. In particular, this applies to the state archives of Ukraine, which have a powerful information potential for the development of national identity and historical memory of Ukrainian citizens.

■ Acknowledgements

None.

■ Conflict of Interest

None.

■ References

- [1] About the work of the Ukrainian State Archive, archival institutions and special institutions of the insurance fund of documentation in 2023 and priorities for 2024. (2024). Retrieved from <http://surl.li/ugydj>.
- [2] Avramenko, O., Nazaruk, T., Rubanska, A., & Serbulov, D. (2024). *Telegram archive of war. An initiative to preserve and organise data from the social network telegram about the russian war in Ukraine. Two-year results of the project*. Retrieved from <https://telegram.lvivcenter.org/files/telegram-archive-report-28022024.pdf>.
- [3] Bozhuk, L., & Khaletska, L. (2024). Proactive documentation of the events of the Russian-Ukrainian War (2022-2024) by the State Archives of Ukraine: Support and cooperation with polish partners. *Cherkasy University Bulletin: Historical Sciences*, 1, 25-34. doi: 10.31651/2076-5908-2024-1-25-34.
- [4] CAAEA staff took part in the scientific seminar "War: Practices of documenting/archiving digital space". (2023). Retrieved from <https://tsdaea.archives.gov.ua/2023/10/16/32433/>.
- [5] Centre for Assistance in Documenting War Crimes. (2024). Retrieved from <https://warcrimescenter.org/>.
- [6] Centre for Urban History. (2024). Retrieved from <https://www.lvivcenter.org/>.
- [7] Chief Prosecutor of the International Criminal Court in The Hague met with the Prosecutor General of Poland. (2022). Retrieved from <https://www.gov.pl/web/prokuratura-krajowa/glowny-prokurator-miedzynarodowego-trybunalu-karnego-w-hadze-spotkal-sie-z-prokuratorem-generalnym-rp>.
- [8] DATTALION in numbers. (2024). Retrieved from <https://dattalion.com/>.
- [9] Documentation, use and dissemination of information during wars: Historical retrospective and challenges of the present. (2024). Retrieved from <http://surl.li/lacxhd>.
- [10] Documenting the experience of war. (2024). Retrieved from <https://www.lvivcenter.org/academic/research/documenting-war/>.
- [11] Documenting the war crimes of the Russian Federation in Ukraine. (2024). Retrieved from <https://warcrimes.gov.ua/>.
- [12] Documenting war crimes in Ukraine. (2022). Retrieved from <https://hfhr.pl/en/news/dokumentowanie-zbrodni-wojennych-w-ukrainie>.
- [13] Grzebyk, P., & Uczkiewicz, D. (Eds.). (2024). *The Russian-Ukrainian conflict and war crimes: Challenges for documentation and international prosecution*. London: Routledge.
- [14] Higgins, E. (2022). *We are Bellingcat. Online investigation of international crimes and the information war with Russia*. Kyiv: "Nash Format".

- [15] Hula, R., Perederii, I., & Sazhko, V. (2022). Domestic archives, libraries and museums as object and subject of consensual war in the terms of the Russian Federation armed aggression against Ukraine. *Bulletin of Kharkiv State Academy of Culture*, 62, 7-40. doi: 10.31516/2410-5333.062.01.
- [16] Information on the actions of the prosecutor's office in the investigation of Russia's attack on Ukraine. (2022). Retrieved from <https://www.gov.pl/web/prokuratura-krajowa/informacja-o-dzialaniach-prokuratury-w-sledztwie-dotyczacym-napasci-rosji-na-ukraine>.
- [17] Khanenko-Friesen, N. (2024). *Testimony of war: From oral history to national documentary heritage*. Retrieved from <https://uamoderna.com/notes/svidchennya-vijny-vid-usnoyi-istoriyi-do-naczionalnoyi-dokumentalnoyi-spadshhyny/>.
- [18] Kysliuk, K. (2024). Coverage of the Russian-Ukrainian war in research articles from the international scientific databases SCOPUS and WEB of SCIENCE for 2023. *Bulletin of Mariupol State University. Series Philosophy. Culture Studies. Sociology*, 26, 21-30. doi: 10.34079/2226-2830-2023-13-26-21-30.
- [19] Mamon, M. (2022). *War in Ukraine. Prosecutor's office appeals to refugees to report evidence of Russian crimes. This can also be done in Częstochowa*. Retrieved from <https://czestochowa.wyborcza.pl/czestochowa/7,48725,28219529,wojna-na-ukrainie-prokuratura-apeluje-do-uchodzcow-o-zglaszanie.html>.
- [20] Mnemonic. (2024). Retrieved from <https://mnemonic.org/en/about/methods>.
- [21] Ostapenko, M. (2022). Consensual war as an element of hybrid war. *Scientific Journal of the National Pedagogical Dragomanov University*, 32, 5-12. doi: 10.31392/NPU-nc.series22.2022.32.01.
- [22] Otrishchenko, N. (Ed.). (2024). *Conversations with those who ask about the war*. Lviv: City History Center.
- [23] Overview of documented war crimes for January. (2024). Retrieved from https://www.helsinki.org.ua/wp-content/uploads/2024/02/Oglyad_War_crimes01_24_A4ukr.pdf.
- [24] Paliienko, M. (2022). The Ukrainian Archives, war, and preservation of national identity. *Archives of Ukraine*, 1, 12-38. doi: 10.47315/archives2022.330.012.
- [25] Paliienko, M. (2024). Archives in emergencies: Valuable response experience. *Archives of Ukraine*, 1, 53-84. doi: 10.47315/archives2024.338.053.
- [26] Polish-Ukrainian relations in the context of Russian aggression against Ukraine: Historical and contemporary contexts. (2024). Retrieved from https://historia.uw.edu.pl/wp-content/uploads/2024/02/Program-A4_1-1.pdf.
- [27] Project DocudaysUA. (2024). Retrieved from <https://ukrainewararchive.org/>.
- [28] Projects. (2024). Retrieved from <https://mcip.gov.ua/en/projects/>.
- [29] Prosecutor General signed an agreement on the establishment of an investigative team between Ukraine, Poland and Lithuania (JIT). (2022). Retrieved from <https://www.gov.pl/web/prokuratura-krajowa/prokurator-generalny-podpisal-umowe-w-sprawie-utworzenia-zespolu-sledczego-pomiedzy-ukraina-polska-i-litwa-jit>.
- [30] Protection of cultural heritage and counteracting cultural erasure in armed conflict. (2024). Retrieved from <http://surl.li/yerycw>.
- [31] Raphael Lemkin Centre for documenting Russian crimes in Ukraine. (2024). Retrieved from <https://instytutpileckiego.pl/pl/instytut/kalendarz/centrum-dokumentowania-zbrodni-rosyjskich-w-ukrainie->.
- [32] Records of terror. (2024). Retrieved from <https://www.zapisyterroru.pl/dlibra>.
- [33] Regional State Archives. (2024). Retrieved from <https://archives.gov.ua/en/regional-state-archives/>.
- [34] Report "Like it, don't like it, suffer it, my beauty – unpunished crimes. Sexual violence by Russian occupation troops against Ukrainian women". (2024). Retrieved from <https://instytutpileckiego.pl/pl/instytut/aktualnosci/raport-podoba-ci-sie-nie-podoba-cierp-moja-piekna-nieukarane>.
- [35] Telegram archive of the war. Blog. (2024). Retrieved from <https://blog.telegram.lvivcenter.org/blog-ukr>.
- [36] Telegram archive of the war. Telegram channel. (2024). Retrieved from https://t.me/tgarchive_war.
- [37] The face of war. Social consequences of wars. (2023). Retrieved from https://www.facebook.com/groups/159051204196509/posts/4351113824990205/?_rdr.
- [38] The tribunal for Putin. (2022). Retrieved from <https://www.helsinki.org.ua/tribunal-for-puti>.
- [39] Tur, O., Shabunina, V., & Sarancha, V. (2023). *Digitalisation of archive funds, museum and library collections as a factor of the preservation of the national cultural heritage of Ukraine*. *Library Science. Record Studies. Informology*, 3, 49-56.
- [40] Ukraine. 5 AM. (2024). Retrieved from <https://www.5am.in.ua/>.
- [41] Union of Ukrainians in Poland. (2024). Retrieved from <https://ukraincy.org.pl/wojna-w-ukrainie-zloz-swiadectwo/>.
- [42] We investigate the collection, preservation, analysis, and publication of Ukrainian war testimonies. (2024). Retrieved from <https://www.lvivcenter.org/researches/u-core-project/>.
- [43] Williams, P.R., & Carle, N. (2023). *The War in Ukraine: A case study in modern atrocity crimes documentation*. *Journal of International Law*, 55(1), 7-38.
- [44] Yemelianova, T., & Pokliatska, V. (2023). Acquisitions of archival audiovisual collections: Influences and consequences of the war. *Archives of Ukraine*, 4, 46-57. doi: 10.47315/archives2023.337.046.

- [45] York, J. (2023). "Accountability and justice": Gathering digital evidence of war crimes in Ukraine. Retrieved from <https://www.france24.com/en/europe/20230228-accountability-and-justice-gathering-digital-evidence-of-war-crimes-in-ukraine>.
- [46] Zadorozhny, G. (2021). Conscientious war is the leading form of geoeconomic subordination of consciousness as a new subject of labor in the context of neoliberal globalization. *Bulletin of Economic Science of Ukraine*, 1(40), 199-206. doi: 10.37405/1729-7206.2021.1(40).199-206.

Події російсько-української війни (2022-2024 рр.): український і польський досвід документування та репрезентації

Людмила Божук

Кандидат історичних наук, доцент
Національний авіаційний університет
03058, просп. Любомира Гузара, 1, м. Київ, Україна
<https://orcid.org/0000-0003-3883-5997>

Леся Халецька

Кандидат історичних наук, доцент
Національний авіаційний університет
03058, просп. Любомира Гузара, 1, м. Київ, Україна
<https://orcid.org/0000-0002-8409-2138>

Анотація. Метою проведеного дослідження було вивчення та порівняння українського і польського досвідів документування подій російсько-української війни в інституційно-організаційному та методологічному аспектах, з точки зору цілей документування та репрезентації зібраних свідчень як важливого чинника формування національної ідентичності та збереження історичної пам'яті. Для досягнення поставленої мети проаналізовано діяльність державних інституцій та громадських організацій з документування подій/злочинів російсько-української війни як в Україні, так і в Республіці Польща. Методологічну основу дослідження становили загальнонаукові та спеціальні методи вивчення проблематики, використання яких дало змогу досягти поставленої мети. Використання комплексу загальнонаукових методів: аналізу та синтезу, системного та функціонального підходів, класифікації та систематизації, опису, пояснення та узагальнення уможливила окреслення проблеми документування та репрезентації подій російсько-української війни 2022-2024 рр. державними інституціями та громадськими організаціями. Проблемно-тематичний метод було використано для осмислення українського і польського досвідів документування та репрезентації подій російсько-української війни 2022-2024 рр. У результаті дослідження було встановлено, що як в Україні, так і в Польщі активно триває процес документування свідчень подій російсько-української війни та воєнних злочинів, скоєних російським агресором як державними установами, так громадськими об'єднаннями. З'ясовано залежність видів і методів документування від умов його проведення, а основу задокументованої інформації становлять усні, письмові, фото-, відео-, кіносвідчення. Доведено, що спільною метою документування подій/злочинів російсько-української війни усіма інституціями є створення доказової бази для притягнення до відповідальності російських агресорів Міжнародним кримінальним судом. Практична цінність наукового доробку, зважаючи на обмеженість дослідження в українському науковому дискурсі означеної теми, полягає у комплексному висвітленні українського і польського досвідів документування та репрезентації подій російсько-української війни 2022-2024 рр. з метою збереження історичної пам'яті, осмислення досвідів війни для майбутніх поколінь

Ключові слова: російська агресія; широкомасштабна війна; представлення; архіви; громадські організації; Україна; Польща



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 9, No. 2, 42-50

Article's History: Received: 04.12.2023 Revised: 28.04.2024 Accepted: 28.06.2024

UDC 81'373.47:81'373.74:070

DOI: 10.69587/sdc/2.2024.42

Revealing lexical means of expressiveness in mass media discourse

Maryna Navalna*

Doctor of Philological Sciences, Professor
National University of Life and Environmental Sciences of Ukraine
03041, 15 Heroiv Oborony Str., Kyiv, Ukraine
<https://orcid.org/0000-0002-5064-3122>

Alla Zlenko

PhD in Historical Sciences, Professor
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0000-0002-5586-3984>

Yuliia Kaluzhynska

PhD in Philological Sciences, Associate Professor
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0000-0002-9787-2686>

Abstract. The study is relevant due to the dynamic lexical processes taking place in the contemporary Ukrainian media discourse. Among the main reasons for such changes are extra-linguistic factors, in particular the Russian-Ukrainian war (2022-2024), which has become not only a broad topic in the Ukrainian information space, but also a reason for a wide expressive evaluation in texts. The article purpose was to identify and analyse the most frequent new manifestations of lexical expressive means in the language of mass communication during the Russian-Ukrainian war (2022-2024). The research applied the following scientific methods, such as the method of comprehensive analysis, which allowed to analyse lexical units; descriptive analysis, which allowed to differentiate and classify lexemes; the method of component analysis, which was used to differentiate the semantic features of lexical units; the method of contextual semantic analysis, which was used to study vocabulary with a focus on the intra-textual environment; the method of quantitative calculations, which was used to determine the trends in the use of language units in texts and headlines of information platforms. It has been found that among the most frequently used expressions are nominalisations for famous persons, Russian politicians in particular, who are not only called expressive lexemes, but also often have invective characteristics. The words with figurative meanings are distinguished by their expressive colouring, among which verbs forming secondary nominations are the most common. It has been proved that the number of colloquial units that act as expressions has increased in the media texts. The mass media discourse of the period 2022-2024 is characterised by the topic of the Russian-Ukrainian war, which has been replaced by other topics (social, economic, etc.). The results of the study could be used to compile dictionaries on media stylistics, and the corpus of collected material could be used in practical classes in journalism courses

Keywords: language of mass communication means; extra-linguistic factors; vocabulary; expressive means; negative evaluation; lexical meaning; stylistic role

Suggested Citation:

Navalna, M., Zlenko, A., & Kaluzhynska, Yu. (2024). Revealing lexical means of expressiveness in mass media discourse. *Society. Document. Communication*, 9(2), 42-50. doi: 10.69587/sdc/2.2024.42.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author

Introduction

The diversity of contemporary studies of mass media text is due to its extraordinary expressions. The language of mass communication is usually characterised by the appropriate style of message presentation and the specificity of language resources. The development of the mass media language is so intensive and unpredictable that questions constantly arise about the definition of style and genre, the differentiation of language units, the timely presentation and explanation of new lexemes in dictionaries, the observance of the norms of the literary language, the correspondence of the logic of the presentation with emotional and expressive colouring, and species differentiation, etc. Therefore, there is a need for a number of studies on the language of Ukrainian mass media. Among the topical aspects that need to be studied and analysed in detail is the problem of expressiveness of media texts.

In general, expressiveness is considered one of the most complex categories in linguistics. It directly relates to the emotional attitude of the speaker (orally or in writing) to the subject or subjects that are spoken about or presented in the text. Sometimes scientific and business speech in its various manifestations and forms is expressive. The main feature of expressiveness is considered to be various states of human mental behaviour that encourage the diversification of speech.

The category of linguistic expression in modern linguistics is considered a broad concept that includes various semantic and stylistic linguistic components that act as a subjective means of a native speaker's attitude to what is said or to the speaker. It is worth noting that the category of expressiveness is characteristic of all levels of language. At the present stage of development of linguistics, expressiveness remains a controversial concept, in particular, there is still no comprehensive scientific study of emotional and expressive means in mass communication texts. Therefore, there is a need to analyse these means used in the language of media materials, which determines the relevance of the topic.

Ukrainian researcher V. Chabanenko (2002) believes that expressiveness has an enhanced and intensified expressiveness, the linguistic element has both socially and psychologically grounded characteristics that modify perception, focus attention, dynamize thinking, evoke feelings and emotions in the reader. The researcher I. Kholiavko (2020) notes that expressiveness performs the intended pragmatic function as a linguistic category that qualitatively characterises human characteristics in terms of an expressive message and the impact of this message on certain information consumers.

The concept of speech expression is characterised and differentiated by the following features:

1) Expression is what is generated by the emotionality and imagery of speech, and not only what makes speech emotional, imaginative, and characteristic.

2) Expression is an intensification, an emphasis on expressiveness, an increase in the exceptional striking power of an expression, giving it a special psychologically motivated sublimity.

3) Expression is connected not only with emotional and figurative (artistic), but also with other plans of expression, such as volitional, aesthetic, social and evaluative, normative, formal and structural, situational and semantic, and others (Chabanenko, 2002).

Often the mass media language is characterised by a combination of the category of expression and the category of standard. Expressiveness is often characterised as a non-normative linguistic unit. The contrast of meanings of a given statement or the structure of a message is formed in such a way that they generally represent an expressive component. The expressiveness of mass media messages is due to the development of various types of mass communication, especially in the first decades of the 21st century.

The word-formation and various stylistic properties of the expressiveness of the Ukrainian literary language have been the subject of numerous scientific studies. A significant contribution to this field was made by V. Chabanenko (2002), who studied in detail various aspects of word-formation processes that form the expressive features of the Ukrainian language. In addition, a detailed analysis of expressive linguistic units was carried out by N. Boyko (2022), who in her work paid attention to syntactic expressions as means of expressing emotional colouring. Particular attention was paid to the expressive means of a literary text, in particular, on the examples of works by M. Matios, which were studied by N. Lukash & S. Pedchenko (2022). Her research helped to understand how the author uses language to convey emotional impact. The study by A. Pozhar (2022) drew attention to the functioning of expressive speech acts in international legal discourse, where the specifics of using expressive units to shape the political and diplomatic context were revealed. The works of V. Yunosova (2023), who classified verbal expressions of motion in the modern Ukrainian language, offering their structural and semantic analysis. In recent years, researchers have focused on expressivity in different languages and translation aspects, as evidenced by O.V. Bondarchuk & O.P. Vorobiova (2021). In addition, in different stylistic dimensions, such as journalistic, scientific and colloquial, studies have been conducted by A. Kishchenko & L. Strii (2023). Equally important is the work of T. Kots (2022), who analysed the use of expressive means in the language of modern Ukrainian media, which emphasises the importance of stylistic research in the context of modern mass communication.

The research purpose was to identify the most frequent manifestations of lexical expressions in the language of mass communication during the Russian-



Ukrainian war (2022–2024); to analyse the primary and secondary meanings of expressions; to describe new lexemes used in the language of Ukrainian media; to determine the stylistic load of linguistic units; to characterise the extralinguistic factors that influence mass media discourse.

During the study, the following methods were applied: as the method of comprehensive analysis, which allowed to analyse lexical units in the lexical and grammatical context; descriptive method, which allowed to differentiate and classify lexemes selected from the language of mass media; the method of component analysis, which was used to differentiate the semantic features of lexical units; the method of contextual semantic analysis was used to study the lexicon with an emphasis on the intra-textual environment; the method of quantitative calculations was used to determine the trends in the use of language units in texts and headlines of information platforms.

Expressions in mass media texts during the Russian-Ukrainian war

During the full-scale Russian-Ukrainian war (2022–2024), the language of the Ukrainian mass media has been actively using invective vocabulary. Contemporary researchers of media texts note that offensive vocabulary is activated in the language of the mass media under the influence of extralinguistic factors. Invectives create a negative assessment in the language of Ukrainian journalism, focusing attention on outright contempt for the invaders of Ukrainian territories, especially expressions concerning politicians, emphasising that the invaders are particularly ill-mannered, impudent, and vulgar. This creates a corresponding contrast between the Ukrainian military and Ukrainians in general (Taranenko, 2010; Navalna et al., 2024a).

The most offensive words with the highest degree of expressiveness are recorded in reference to the head of the Russian Federation, Volodymyr Putin, who is often referred to as a *puilo*, compare: *In recent days, I have encountered dozens of reactions from people with the general meaning of "Die, **Puilo**". It is clear that these are emotions. But in fact, there are many people who are convinced that once the dwarf dies, we will heal. I believe that this is a very wrong opinion* (Ukrainian Truth, n.d.).

While the analysed lexeme is very frequent in scientific publications and in the language of mass communication two years ago, the corpus of the collected material shows the use of the expressive almost ten years ago. It is worth noting that the lexeme *puilo* appeared in headline complexes at that time, for example: *Don't panic, because that's what the **puilo** wants. We will win!* (title) (Ukrainian Truth, n.d.).

From the corpus of the collected material to refer to the Russian leader, it is possible to distinguish the lexeme *Putler*, which contrasts with neutral vocabulary and gives the texts an emotionally expressive colouring, compare: *"Die, **Putler**. No to War": a scientist left*

a secret "message" in an article for a Moscow university (Glavkom, 2023); *The view: The Post Norman **Putler** (title). Even Putin's court sycophants find it difficult to accept the image of him that he offers to the world by constantly rattling his guns. The similarities with his predecessor, the German Fuhrer, are hard to miss* (Kyivpost, n.d.). Researchers note that in the language of contemporary journalistic texts, Russian President Volodymyr Putin is referred to with offensive nominalisations for outright lies, immoral behaviour, and ridiculous statements (Navalna et al., 2024b).

In the language of the Ukrainian mass media, it is possible to come across the lexeme *dwarf*, which assesses the physical characteristics and appearance of a *dwarf*: "1. An unnaturally small person; a midget, a short man, a runt, a dwarf // Of a very short, very small object. 2. *with the meaning*. Of a person who is very insignificant from a certain point of view, miserable person" (Dictionary, IV: 107, n.d.). With the analysed lexeme, the authors use adjectives that form the already established phrases *mad dwarf*, *Kremlin dwarf*, *bunker dwarf*, etc. For example: *This is no longer Putin. Putin is a **mad dwarf**. And today, ordinary Russians are killing our children and the elderly. They are simply destroying our country. For no reason at all. It is simply unclear why* (Ukrainian Truth, n.d.); ***Kremlin dwarf** Putin is trying to train possible successors to his regime from among his children and relatives, as well as the children of other Russian officials* (Ukrainian Truth, n.d.); ***Bunker dwarf** Putin wants to know what hits him* (title). *Serhiy Kolyada on how long-range ATACAMS missiles affect Putin* (Kyivpost, n.d.).

Ukrainian journalists use insulting words to refer to Russian politician Dmytro Medvediev, calling him an *alcoholic* "one who suffers from alcoholism; a drunkard" (Dictionary, I: 34, n.d.). With this lexeme, the authors use adjectives that often form expressions already known to consumers of information, compare: the main alcoholic, the dwarf alcoholic, the main political alcoholic, etc.: *Russia's **chief alcoholic** Medvediev starts openly complaining about Putin* (5 channel, 2022); *The Kremlin's **dwarf alcoholic** drinks himself to the apocalypse again* (Newspaper, 2024); *The **chief political alcoholic*** (title). *Rumours about the alcoholism of former Russian President Dmytro Medvediev are less reliable, but many of the interlocutors answered in the affirmative when asked whether the deputy head of the Security Council drinks* (Correspondent, 2023).

Thus, the expressions used in media texts during the Russian-Ukrainian war are of particular importance, performing the function of emotional influence and mobilising public opinion. These texts often contain words and expressions that have a strong expressive charge and are aimed at arousing patriotic feelings, compassion and solidarity with the Ukrainian military and victims of the conflict. Such means can be both positive and negative, emphasising the heroism of Ukraine's defenders or condemning the actions of the aggressor.

Expressions-nominations in the media language

Researchers include a number of lexemes that name and insult Russians as expressions of social origin and status, political views (Navalna *et al.*, 2024a). These words include *rusnya*, *orc*, *rashyst*, *katsap*, etc. According to the authors' calculations, the most common expression is *rashyst*, compare: **Rashysts** want to use VT-30E unmanned helicopters to search for kamikaze boats (Defense Express, 2024); **Rashysts** themselves showed that the Armed Forces of Ukraine burned their "Zemledelie", which is a rather rare event (Defense Express, 2024); **Rashysts** wounded a resident of Sumy Region: 52 explosions in one day (Sumy Today, 2024). The lexeme *rashysm* was recorded as a linguistic unit denoting "an ideological direction formed by the behaviour of Russians, the leaders of this country", for example: 80th anniversary of the Normandy landings: Biden compared fascism to **rashysm** (Ukraine is Young, n.d.).

Along with the above-mentioned words (*katsap*, *orc*), the authors of Ukrainian mass media texts use the lexeme *zhyvoder* "Same as a cannibal" (Dictionary, II: 526, n.d.); *zhyvoid* "A person who exploits, profits from, or mistreats others" (Dictionary, II: 526, n.d.), compare: **Katsap** means a **cannibal** and **orc** means a cruel beast (title). The derogatory nickname "**katsap**" has been attached to the Moscow people since 1552, when Tsar Ivan the Terrible conquered the powerful Kazan Khanate by war... (Herald. Luts, 2022).

A well-known Ukrainian producer and composer Olena Mozgova calls Putinist supporters on her information platform a *suchara*, an expressive for a "very bad person; mean; unpredictable; lying", compare: "A stupid head **Suchara**, wait for something to be cut off". Mozgova about a colleague who supported Putin (Gordon.ua, 2022). This type of lexemes is referred to as sub-standard units that not only speak journalistic texts, but also give them an expressive colouring.

In the mass media discourse, lexemes with figurative meanings are contrasted. Most of the lexemes with secondary nomination are verbs, as this part of speech has a wide semantics (Otin, 2005). Among the corpus of the collected material from the language of Ukrainian mass media, the verb *rest* is recorded as "1. To recover from fatigue (physical or mental) by stopping an action, movement, etc. 2. To lie in the grave" (Dictionary, I: 622, n.d.), and used in the second figurative sense, compare: The Ukrainian Armed Forces showed how Russians "**rest**" in burnt tanks near Vuhledar (Ukrainian Truth, n.d.). In the context of the Russian-Ukrainian war, journalists refer to the state of the deceased not in the grave, but in the tanks and vehicles burnt by the Ukrainian military.

The authors use the verb *dolitatysia* in the same context. "The Dictionary of the Ukrainian Language" in 11 volumes defines the lexeme *dolitaty* as "1. Flying, to reach something, some place" (Dictionary, II: 359, n.d.). In media texts, the verb denotes "the end of any action

or process that ended tragically", compare: "**Dolitalysia**": SU-34 fighter crashed in Ossetia, SU-25 shot down by the AFU (Ukraine is Young, n.d.). The context refers to the reality of the flights of a Russian fighter jet that was shot down by the Armed Forces of Ukraine.

The authors usually put lexemes with figurative meanings in quotation marks, thus indicating that the word has a secondary nomination. The verb *bless* is recorded in the same way. The aforementioned lexicographical work interprets the word *bless* as: "1. To christen someone, saying a prayer, a wish. 2. To give consent to something, to allow someone to do something" (Dictionary, I: 194, n.d.). The second meaning is used in the international context of the Russian-Ukrainian war: Blinken in Kyiv announced billions in aid and "**blessed**" the tactics of strikes against Russia (Ukraine is Young, n.d.).

During the war in Ukraine, journalists have not abandoned the topic of enrichment of politicians and public officials through illegal means or by stealing funds from the state budget, at the expense of land, etc. The authors refer to these actions with the verb *enrich*. "The Dictionary of the Ukrainian Language" in 11 volumes defines the lexeme *enrich* as "1. intransitive. To acquire a household, to make a fortune; to get rich. To become rich at the expense of something" (Dictionary, VIII: 679, n.d.), compare: Imitation of legality: how the former head of the Lviv Regional State Administration Turianskyi "**enriched himself**" 11 acres of land on the outskirts of Lviv (Ukraine is Young, n.d.).

In mass media texts, the verb *earn* is encountered in the figurative sense of *earning money*. Although the dictionary defines *earn* as: "1. transitive and rarely intransitive. By working, to acquire the right to receive pay or to be paid for work done" (Dictionary, III: 293, n.d.), but in the language of newspaper texts the lexeme is used in the sense of "to obtain something by dishonest, robbery", compare: "*Sluga*" is suspected: deputy Klochko "**earned**" 11 million by hard work (Ukraine is Young, n.d.). The verb *pilot* is recorded in the dictionary as "to control an aircraft during flight" (Dictionary, VI: 535, n.d.), but in media texts it is used as "to test any unit, mechanism, etc.", compare: More comfortable than in ROLLS ROYCE: Reznikov "**piloted**" the first Challenger tanks in Ukraine (Ukraine is Young, n.d.).

The lexeme *drop a word*, which is defined in the dictionary as *blabbermouth* "1. To inadvertently say something that should not be said; to blurt out. 2. To add a further remark, caveat, or correction to a previous statement; to further explain something" (Dictionary, V: 542, n.d.), which in the media text is used in the figurative sense of "by the way, he said", compare: Reznikov "**dropped a word**": State Audit Service confirms overpricing in food contracts for the Armed Forces of Ukraine (Ukraine is Young, n.d.).

Contrasting with the neutral vocabulary is the verb in the figurative sense of *congratulate*, which is listed in the "Dictionary of the Ukrainian Language" as: *to*

congratulate "1. To address someone during a meeting with a greeting, showing friendliness. 2. To express to someone a feeling of joy, satisfaction about an event, success, etc.; to congratulate. 3. To accept or approve something with joy. 4. To receive someone hospitably. To treat, to give a meal. 5. To invite. 6. The same as to enter // To stay at someone's place" (Dictionary, I: 686, n.d.). In mass media texts, it is recorded in the sense of "to inform about restrictions, bans, etc.", for example: *Australia and New Zealand "congratulated" Russia on the anniversary of the invasion with new sanctions* (Ukraine is Young, n.d.).

Based on the analysis, it can be concluded that expressive nominalisations and lexemes with figurative meanings play an important role in the language of the Ukrainian mass media, especially in the context of the Russian-Ukrainian war. The use of such linguistic units enhances the expressive and emotional colouring of texts, influences readers, shaping their attitude to events and participants in the conflict.

■ Noun-adjective expressions in media texts

In addition to verbs with a figurative meaning, words of other parts of speech are sometimes recorded. Thus, *re-election* is an action for *re-elect* "To elect to some office or position someone else instead of the one elected earlier; to elect anew to perform certain duties" (Dictionary, VI: 239) is used in media texts in the figurative sense of "fictitious, false election to an office anew", compare: *European Parliament calls for not recognising Putin's "re-election" in Russia* (Ukraine is Young, n.d.).

In a figurative sense, journalists use the noun *invitation* "1. Action by the meaning of invite. 2. A request (verbal or written) to do something, to participate in something. 3. An official card that is an admission to a meeting, concert, etc." (Dictionary, III: 282, n.d.), which in this context is used as "a mandatory report in official structures", compare: *NABU Director Kryvonos ignored the "invitation" of the Verkhovna Rada committee* (Ukraine is Young, n.d.).

Adjective *peaceful* "1. Adj. to peace // Taking place in a peaceful environment, not disturbed by war. / Acting or being used in a peaceful environment, serving the cause of peace. / Related to the conclusion of a peace treaty. 2. Devoid of hostile intentions; pursuing a policy of peace. 3. Tending to harmony, friendly relations; peaceful, conciliatory. 4. Not disturbed, not interrupted by anything; calm, quiet. // Devoid of anxiety, unpleasant experiences" (Dictionary, IV: 713, n.d.) is also used by the authors in the figurative sense of "an unacceptable, primitive version of something, or a situation", compare: *Zelenskyy considers Trump's "peacefull" plan primitive* (Ukraine is Young, n.d.).

The adjective *painful* has a secondary nomination "1. Subject to disease; painful, sickly. 2. Caused by, caused by pain, pains; associated with illness. 3. Sorrowful, sad, melancholy" (Dictionary, I: 218, n.d.), which is used in mass media texts as "topical; complex, etc.", compare:

Ban on the UOC MP: Stefanchuk promises compromise on "painful" bill (Ukraine is Young, n.d.).

Among the collected material, it is possible to single out the lexeme *mirrored* in a figurative sense "1. Adj. to mirror. // Made of mirror, equipped with a mirror. 2. Having a smooth, shiny surface" (Dictionary, II: 266, n.d.), which is given in the sense of "parallel; proportional; corresponding", compare: *If Ukraine loses, Poland will lose: Ukrainian carriers have started a "mirrored" blockade of the border* (Ukraine is Young, n.d.).

Occasionally, it is possible to come across participles in a figurative sense, for example: *hidden* "1. Passive voice, past participle of hide. 2. adj. Having no pronounced features; barely noticeable. 3. adj. Not openly or fully manifested; restrained. 4. adj. Keeping secret; secret, secretive. 5. adj. Not yet manifested in anything" (Dictionary, VIII: 83, n.d.), meaning "known; obvious, etc.", compare: *"Hidden" billions of assets of the sanctioned oligarch Novinsky arrested* (Ukraine is Young, n.d.).

Media linguist Y. Kaluzhynska (2021) notes that media texts are dominated by negative evaluation conveyed by lexemes with figurative meanings, in particular, the use of lexemes with secondary nomination with a pejorative evaluation, which is recorded in most mass media texts. The journalists pay special attention to the economic sphere. In addition, the authors condemn the inaction of Ukrainian politicians regarding the economic crisis in the country. Newspaper periodicals sometimes record negative processes taking place in various organisations: budgetary, banking, economic, etc. Researcher T. Prudnykova (2020) emphasises the actualisation of economic topics in the Ukrainian media, in particular, focusing on negative assessment in this area. It is possible to agree with the researchers that for several years there has been a trend towards extensive negative assessment in the mass media, but the focus has shifted from economic issues to the Russian-Ukrainian war and related topics.

■ Colloquialisms as a means of expressiveness in journalistic materials

Colloquial lexemes add emotional and expressive colour to mass media texts. This is the case with the colloquial verb *to prank* "to do something naughty" (Dictionary, V: 12, n.d.), compare: *"Pranked": in Crimea, the Armed Forces of Ukraine destroyed C-400 and C-300 air defence systems* (Ukraine is Young, n.d.). As well as the lexeme *racketeering* from racket "criminal activity involving robbery or extortion, sometimes in exchange for safety and protection from other racketeers and criminals". The colloquialism of the analysed lexeme is given by the suffix *-er-*, which denotes the suddenness, speed of a process or action, for example: *New routes and Klychko's rating: how one of Kyiv's largest carriers was "racketeered"* (title). *While battles for the fate of Ukraine continue on the frontline, a fierce struggle for the money of public transport passengers has resumed in the shelled rear* (Ukraine is Young, n.d.).

Colloquialisms include *shalimivets*, *ramshtanivets*, etc. *Shalimivets* is "followers of Shalimov" (Shalimov Oleksandr is a well-known national surgeon, founder of the medical school of the same name. The National Research Centre for Surgery and Transplantation of the National Academy of Medical Sciences of Ukraine is named after him); *ramshtanivets* is a member of the international Ramstein format coalition (the Ukraine Defense Contact Group, also known as the "Ramstein format", is an international community that has been providing military assistance to Ukraine in repelling the Russian attacks of 2022-2024. More than 50 countries are involved in the community, all NATO nations, most EU countries, and some allies from Africa and Asia), for example: *Saved Lives: "Shalimovtsi" performs successful kidney transplants* (title). *Doctors at the Shalimov Institute of Transplantology have performed successful kidney transplants on two women: Natalia, 18, and Yuliia, 35, who suffered from serious kidney disease* (Ukraine is Young, n.d.); *F-16 are on the way: Zelenskyy calls on "ramshtainivtsi" to provide fighter jets* (Ukraine is Young, n.d.).

Contrasting with neutral vocabulary and adding emotional and expressive colour to mass media texts is substandard vocabulary, in particular the slang *bucks* – dollars, compare: *"Bucks" from the bank: in Kyiv, a 22-year-old employee took out 400 thousand dollars* (Ukraine is Young, n.d.). Journalists often refer to weapons as jargonised units, which is how the lexeme *birdie* is encountered" 1. It is a diminutive of bird. Every bird knows its own nest. 2. Same as bird. A mark on paper in the form of two dashes forming an acute angle facing downwards. Excited and red with tension" (Dictionary, VIII: 380, n.d.) – a MIG-29 fighter jet, compare: *The long-awaited "birdies": Slovakia will supply Ukraine with MIG-29 fighters* (Ukraine is Young, n.d.).

The lexeme *vegetable* is one of the slangisms: "1. Fruits of garden (rarely wild) plants and herbs used as food; vegetable garden. 2. The fruits of garden (rarely forest) trees and shrubs; fruit, garden produce. 3. The soft fruit of any plant", which means a *vegetable*, is the name given to people with serious illnesses (such as paralysis)" (Dictionary, V: 612, n.d.). It also refers to a person who has no will and no sense of self in time and space, no emotions and all kinds of sensations such as hunger, cold, wet, dirty, pain; health problems; a non-initiative, indifferent person who has no goals or aspirations. Journalists often refer to Russian citizens as such, for example: *If you don't want to live like a vegetable, then set a goal* (title). *Vegetables live without a goal, and they are actually fine. Most people live a completely vegetable life, living without goals, like vegetables...* (Psychology, 2023); *"How not to become a nation of vegetables? First of all, you need to realise that there is no free information"*, – Oksana Moroz (ArmyInform, n.d.).

The slang term "yevrobliaakha" is often used, derived from "euro-" and the Polish *blacha* "in", slang for

"car number plate", abbreviated as "yevrobliaakha" and "bliakha". A typical *yevrobliaakha* is an old car aged 5 to 15 years, registered abroad, compare: *Car in a smart-phone: customs clearance of "Yevrobliaakha" is planned through the "Diia" app* (Ukraine is Young, n.d.).

The well-known researcher of the language of mass communication M. Pylynskyi (1977) emphasised colloquialism as an expressive means in the language of the media, mostly concerning colloquial verbs that have a wide semantics and form a number of colloquial units recorded in academic dictionaries. N. Polishchuk (2021), in a study on the colloquialism of the language of the mass media, notes that oral speech is actively included in journalistic texts. In addition to expressiveness, accessibility, and ease, such lexemes sometimes add familiarity, sarcasm, and vulgarity to journalistic materials and at the same time undermine lexical norms. It is worth agreeing with scholars that the analysed colloquial lexemes undermine literary norms, but at the same time they contrast with commonly used nominations, which is what expresses the mass media text.

■ New expressive lexemes and its variants of meanings in the language of mass media

The emotionally expressive lexemes include new complex formations such as: *sabotage-block*, *putinist-alcoholic*, etc., compare: *The Parliament is sabotaging-blocking the bill on the liquidation of the Moscow church – Kniazhytskyi* (Ukraine is Young, n.d.); *Putinist-alcoholic Medvediev has already started talking about Ukraine's possible involvement in the attack in the Moscow region* (Business capital, 2024).

New words in the language of the Ukrainian mass media are the names of weapons and various mechanisms with different spellings, for example: *MIM-104 Patriot, Gepard, drone, lancet*, etc., compare: *"Patriots" are needed now in the hands of Ukrainians. Modern fighters are needed in Ukrainian skies. Russian missiles and Iranian "Shahids" must lose, so that ruins never win in life anywhere, – the head of state stressed* (ArmyInform, n.d.); *Germany to provide Ukraine with Patriot, IRIS-T and Gepard – Scholz* (Ukraine is Young, n.d.); *Ukraine has developed drones more powerful than Russian "lancets"* (Ukraine is Young, n.d.). The lexeme *drone* has been used to form a new unit *drone-studies*, compare: *How we created the future death of the occupiers: a drone-studies for young people was held in Kyiv* (Ukraine is Young, n.d.).

Mass media texts are characterised by linguistic economy. During the analysed period, it is possible to distinguish the univertates *ze-government* (the government of Volodymyr Zelenskyy) and *oboronka* (the country's defence system), for example: *Mobilisation and departure of men abroad: instead of incentives, the ze-government resorted to repression* (Ukraine is Young, n.d.); *Von Der Leyen proposes to integrate Ukraine's*



“oboronka” into the EU defence industry (Ukraine is Young, n.d.).

Emotional and expressive colouring of journalistic texts is provided by occasionalisms. To the already well-known term *bankopad* (currency risks), new words have been added, such as *sushkopad* (about the downing of SU-34), *tushkopad* (about the downing of aircraft), etc., compare: *Ukraine may repeat the 2014 “bankopad”: but the consequences will be much more serious* (Ukraine is Young, n.d.); *After the last “sushkopad”, Russians reduced the activity of aircraft in the skies over Ukraine* (Ukrainian Truth, n.d.); *“Sushkopad” discouraged Russians from flying over Ukraine* (Volynpost, 2024); *“Tavria” spokesman talks about the consequences of the “sushkopad” for the front line* (Ukrainian Truth, n.d.); *Effect of the “sushkopad”: the Armed Forces of Ukraine explained why the enemy uses aviation less* (24tv channel, 2024); *“Sushkopad”, “tushkopad”, the downing of unique A-50s. Since the beginning of the war, the Russians have lost more than 350 aircraft. And 2024 was a real disaster for enemy aircraft. In January, in addition to attack aircraft, the Russians lost a rare A-50 DRLO. An Il-22M command air post also suffered significant damage* (News of Ukraine, 2024).

Prior to the formation of the lexeme *tushkopad*, *Tushkopad* in Ukrainian, journalists used the lexeme *tushka* “diminutive of flesh; the body of a killed animal, fowl, etc. of small size” (Dictionary, X: 331, n.d.), flesh “1. The whitewashed and gutted body of a slaughtered animal. // The dead body of a large animal. 2. The large, fat body of a person” (Dictionary, X: 331, n.d.) or *tushkopad*, but in the sense of “people’s deputies of Ukraine who vote for decisions together with factions they are not members of”, compare: *There are many tushkas in the Verkhovna Rada (deputies who defect from one faction to another)... The so-called “tushkopad” is still ahead of us*, – Kalietnik (One platform for communication, 2015).

Media text researcher L. Diadechko (2012) focuses on occasionalisms in advertising materials. Z. Koloiz (2008) describes the techniques of occasional expressiveness, mostly of a derivational nature. The author emphasises that occasionalisms are actively included in the language of the mass media, under the influence of extralinguistic factors, and are widely represented in the social, political and communicative spheres. These new formations seem unusual to the consumer of information, and they are mostly expressive. As a rule, such expressive word forms originally name both objects and actions, and their creation is facilitated by both the law of linguistic economy and the author’s individuality. It is possible to agree with the researchers those occasional formations serve as an expressive occasional technique in media texts, but during the analysed period, the emphasis on the creation of these linguistic units has obviously shifted to nouns denoting persons, in particular, famous politicians, and naming types of weapons and their modifications.

Conclusions

Thus, the Ukrainian mass media discourse is determined by dynamic processes in the lexicon. In the period of the Russian-Ukrainian war, the expressive function is distinct, which is achieved through the active use of nominalisation to refer to famous people, Russian politicians in particular, who are named not only with expressive lexemes, but also often have invective characteristics.

The words with figurative meanings are distinguished by expressive colouring, among which verbs are the most frequent, forming secondary nominations due to their broad semantics. Nouns and adjectives are less likely to acquire figurative meanings.

In mass media texts, it is possible to record colloquial units that act as expressions. Usually these are well-known lexemes marked as colloquial, newly known words that often have colloquial characteristics, and sub-standard vocabulary that contrasts with written speech. As expressions in mass media texts, it is possible to distinguish complex formations, univerbates and occasionalisms, which, against the background of commonly used words, have an appropriate emotional load. Along with a variety of stylistic variants, expressions sometimes undermine literary norms, which journalists mark with quotation marks in their writings. If in previous periods journalists used quotation marks mainly for secondary nominations and proper names, in the current period they mostly use them to mark linguistic material that goes beyond the defined standards (occasionalisms, univerbates, latinised lexemes, new words, etc.). In this way, the authors protect themselves by emphasising that the quotation marks are used deliberately.

The corpus of the analysed material has shown that most expressions are not recorded in academic dictionaries or do not have variants of new meanings. Such intensity of replenishment of the Ukrainian dictionary indicates dynamic processes in the vocabulary of Ukrainian media. Thus, it can be argued that the information space of Ukraine is testing new lexemes or manifestations of the meanings of already known lexemes for the first time. Lexemes with emotional and expressive colouring often vulgarise the Ukrainian media space, but the accents of sarcasm and familiarity are focused on people who started and continue the war or support military actions with the help of various resources. The media discourse of the period 2022–2024 is generally characterised by the topic of the Russian-Ukrainian war, which has given way to other topics (social, economic, etc.).

The research is likely to be further enhanced by the study of other means of expression in mass media discourse, including grammatical ones.

Acknowledgements

None.

Conflict of Interest

None.

References

- [1] 24tv channel. (2024). Retrieved from https://24tv.ua/plavuchi-bronezhileti-testuyut-zsu-minoboroni-pokazalo-foto-zi_n2514123.
- [2] 5 channel. (2022). Retrieved from <https://www.5.ua/svit/holovnyi-alkoholik-rosii-medvediev-pochav-vidkryto-skarzhytysia-na-putina-zmi-285264.html>.
- [3] ArmyInform. (n.d.). Retrieved from <https://armyinform.com.ua>.
- [4] Bondarchuk, O.V., & Vorobiova, O.P. (2021). Means of expression in English-language popular scientific text and ways of its reproduction in Ukrainian translation. *New Philology*, 84, 32-37. doi: 10.26661/2414-1135-2021-84-4.
- [5] Boyko, N.I. (2022). Problems of expressive syntax in the linguistic heritage of Professor N. Guyvanyuk. In *Actual problems of syntax: Current state and prospects of research: Materials of the international scientific conference dedicated to the 110th anniversary of the birth of Professor Hilarion Slynok* (pp. 58-60). Chernivtsi: Yuriy Fedkovych Chernivtsi National University.
- [6] Business capital. (2024). Retrieved from <https://www.dsnews.ua/ukr/world/putinist-alkogolik-medvedyev-uzhe-zagovorov-pro-mozhlivu-prichetnist-ukrajini-do-napadu-v-pidmoskov-ji-22032024-498324>.
- [7] Chabanenko, V.A. (2002). *Stylistics of expressive means of Ukrainian language*. Zaporizhzhia: ZDU.
- [8] Correspondent. (2023). Retrieved from <https://ua.korrespondent.net/world/4581279-zmishuvaty-alkohol-ta-narkotyky-medvedievu-poradyly-z-feikovoho-akauntu>.
- [9] Defense Express. (2024). Retrieved from <https://defense-ua.com>.
- [10] Diadechko, L.A. (2009). *Occasionalisms in modern advertising texts: Cognitive-pragmatic and socio-functional aspects*. *Studia Linguistica*, 3, 76-83.
- [11] Dictionary of the Ukrainian language (in XI volumes). (n.d.). Retrieved from <http://sum.in.ua>.
- [12] Glavkom. (2023). Retrieved from <https://glavkom.ua/world/observe/zdokhni-putler-ni-vijni-vchenij-zalishiv-tajemne-poslannja-v-statti-dlja-moskovskoho-universitetu--957612.html>.
- [13] Gordon.ua. (2022). Retrieved from <https://gordonua.com/ukr/news/society/suchara-tupogolova-chekaj-zrizhut-i-tobi-shchos-mozgova-pokazala-jak-chicherina-znjala-ukrajinskij-prapor-u-energodari-1601085.html>.
- [14] Herald. Luts'k. (2022). Retrieved from <https://visnyk.lutsk.ua>.
- [15] Kaluzhynska, Y.V. (2021). *Lexemes with a negative figurative meaning in newspaper texts on economic topics*. *Transcarpathian Philological Studies*, 1(19), 31-35.
- [16] Kholiavko, I. (2020). *Means of expressiveness in Ukrainian linguistics scientific articles*. *Scientific Journal of Lviv State University of Life Safety "Lviv Philological Journal"*, 8, 185-190.
- [17] Kishchenko, A., & Strii, L. (2023). Lexical means of expressing the category of expressiveness in modern Ukrainian prose. *Bulletin of Odessa National University. Philology*, 27(2), 42-53. doi: 10.18524/2307-8332.2022.2(26).274981.
- [18] Koloiz, Z.V. (2008). Techniques of expression of occasional expression. *Bulletin of Zaporizhzhia National University: Collection of Scientific Articles. Philological Sciences*, 1, 96-101.
- [19] Kots, T. (2022). *Linguistic expression in modern information space of Ukraine*. *Ukrainian Language*, 3(83), 25-39.
- [20] Kyivpost. (n.d.). Retrieved from <https://www.kyivpost.com>.
- [21] Lukash, N., & Pedchenko, S. (2022). Linguistic means of expressing the artistic text (based on the novel "Diary of the executioner" by Maria Matios). *Scientific Journal of the Lviv State University of Life Safety "Philological Periodical of Lviv"*, 12, 104-109. doi: 10.32447/2663-340X-2022-12.17.
- [22] Navalna, M., Kostusiak, N., Mezhev, O., Sovtys, N., Khomych, T., Hlushych, V., Adakh, N., Prymachok, O., Skliarenko, O., & Holoiukh, L. (2024a). *Nomens for designation of persons in the Ukrainian media discourse*. *AD ALTA: Journal of Interdisciplinary Research*, 14(1), 54-59.
- [23] Navalna, M., Kostusiak, N., Sazonova, Y., Prosiannyk, O., Skliarenko, O., Chernobrov, Y., Ovsienko, A., Prymachok, O., & Shynkar, T. (2024b). *Invective vocabulary in the language of the Ukrainian mass media during the Russian-Ukrainian War: Stylistic layers and pragmatics of meaning*. *AD ALTA: Journal of Interdisciplinary Research*, 14(1), 47-53.
- [24] News of Ukraine. (2024). Retrieved from <https://nv.ua/ukr/ukraine/events/yak-ukrajina-vitisnyaye-aviacyu-rf-z-okupovanih-teritoriy-bez-f-16-ekspertniy-analiz-video-50424592.html>.
- [25] Newspaper. (2024). Retrieved from <https://gazeta.ua/blog/61110/karlikovij-alkogolik-kremlya-znovu-dopivsyia-do-apokalipsisu>.
- [26] One platform for communication. (2015). Retrieved from <https://us04web.zoom.us>.
- [27] Otin, E.S. (2005). Expressive and stylistic features of onomastic vocabulary in East Slavic languages. In *Papers on linguistics* (pp. 122-134). Donetsk: Yugo-Vostok LLC.
- [28] Polishchuk, N.O. (2021). *Lexical means of communication in modern newspaper language*. *Terminological Gazetteer*, 6, 270-276.

- [29] Pozhar, A. (2022). *Speech acts of expressives in international legal discourse: Types, structure and functions*. *Lviv Philological Magazine*, 10, 109-114.
- [30] Prudnykova, T.I. (2020). *Trends in the development of the economic vocabulary of the Ukrainian language against the background of social dynamics*. (PhD dissertation, Lesia Ukrainka Eastern European National University, Lutsk, Ukraine).
- [31] Psychology. (2023). Retrieved from http://psychologis.com.ua/ne_hochesh_zhitzpt_kak_ovosch_-_stav_celi.htm.
- [32] Sumy Today. (2024). Retrieved from <https://sumy.today/news/society/41773-rashysty-poranyly-zhytelia-sumshchyny-52-vybukhy-za-den.html>.
- [33] Taranenko, O.O. (2010). *On the topic of modern Ukrainian onomasticon: Trends of connotative layering*. *Linguistics*, 1, 14-36.
- [34] Ukraine is Young. (n.d.). Retrieved from <https://umoloda.kyiv.ua>.
- [35] Ukrainian Truth. (n.d.). Retrieved from <https://www.pravda.com.ua>.
- [36] Volynpost. (2024). Retrieved from <https://www.volynpost.com/news/236151-sushkopad-vidbyv-u-rosiiian-bazhannia-litaty-nad-ukrainoyu>.
- [37] Yunosova, V.O. (2023). Verbal expressives for movement in the modern Ukrainian language. In *Science and technology: Problems, prospects and innovations: Materials of the 11th international scientific and practical conference* (pp. 193-202). Osaka: CPN Publishing Group.

Вияви лексичних засобів експресивності в масмедійному дискурсі

Марина Навальна

Доктор філологічних наук, професор
Національний університет біоресурсів і природокористування України
03041, вул. Героїв Оборони, 15, м. Київ, Україна
<https://orcid.org/0000-0002-5064-3122>

Алла Зленко

Кандидат історичних наук, професор
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0000-0002-5586-3984>

Юлія Калужинська

Кандидат філологічних наук, доцент
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0000-0002-9787-2686>

Анотація. Актуальність дослідження зумовлена динамічними лексичними процесами, що відбуваються в сучасному українському масмедійному дискурсі. Серед головних причин таких змін – позамовні фактори, зокрема російсько-українська війна (2022-2024 рр.), що стала не тільки широкою темою в українському інформаційному просторі, але й приводом широкої експресивної оцінки в текстах. Метою статті було виокремити та проаналізувати найчастіші нові вияви лексичних експресивних засобів з мови засобів масової комунікації періоду російсько-української війни (2022-2024 рр.). У розвідці використано наукові методи: метод комплексного аналізу, що дав змогу проаналізувати лексичні одиниці; описовий, що дав змогу диференціювати й класифікувати лексеми; метод компонентного аналізу – для диференціації значеннєвих ознак лексичних одиниць; метод контекстуально семантичного аналізу використано для вивчення лексики з акцентом на внутрішньотекстове оточення; метод кількісних підрахунків – для визначення тенденцій уживання мовних одиниць у текстах та заголовках інформаційних платформ. Встановлено, що серед найуживаніших експресем – номінації на позначення відомих осіб, російських політиків зокрема, яких іменують не тільки експресивними лексемами, але й нерідко вони мають інвективні характеристики. Експресивно-забарвленими виявами вирізняються слова з переносними значеннями, серед яких найбільше дієслів, що утворюють вторинні номінації. Доведено, що в масмедійних текстах додалося розмовних одиниць, які виступають у ролі експресем. Для масмедійного дискурсу періоду 2022-2024 років характерна тематика російсько-української війни, якій поступилися інші тематики (соціальна, економічна тощо). Результати дослідження слугуватимуть для укладання словників із медіастилістики, корпус зібраного матеріалу може бути використаний на практичних заняттях із журналістських курсів

Ключові слова: мова засобів масової комунікації; позамовні чинники; лексика; експресивні засоби; негативна оцінка; лексичне значення; стилістична роль



Communicative techniques of the U.S. presidents for effective nation leader image formation in social consciousness

Valery Savchuk*

Lecturer

Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0009-0001-6407-2463>

Abstract. The study of crisis speeches by U.S. presidents Donald Trump, Joe Biden, and Barack Obama is important due to the increasing role of effective political communication in contemporary society. The analysis of language means, used in these speeches, helped to understand how leaders influence the audience and shape their positive image. The aim of the study was to identify the key language devices the presidents use for effective communication with the audience and the formation of a positive leader's image. The research methodology was based on a comprehensive approach, including phonetic, lexical, and syntactic analysis of speech texts. Semantic analysis was applied to identify key language blocks, along with intent analysis to determine the communicative techniques employed by presidents to influence the audience. The study's findings revealed that the use of stylistic devices at the phonetic, lexical, and syntactic levels play a crucial role in the effectiveness of crisis speeches by U.S. presidents Donald Trump, Joe Biden, and Barack Obama. At the phonetic level, alliteration emerged as a prominent tool, used to create a rhythmic flow that enhances emotional resonance and emphasizes key points. This technique, frequently employed by all three presidents, draws attention to important terms, aiding in the retention and impact of their speeches. At the lexical level, metaphors and epithets were identified as essential for creating vivid imagery and simplifying complex issues. Metaphors allowed the presidents to convey abstract or multifaceted concepts in a relatable and emotionally charged manner. Syntactic devices, including antithesis, parallel constructions, and repetition, were found to reinforce key messages by providing structural clarity and emotional depth. Antithesis was especially effective in highlighting contrasts between achievements and challenges. Such rhetorical structures not only heightened the persuasive power of the speeches but also strengthened the presidents' portrayal as decisive and competent leaders. The findings underscore the importance of stylistic devices in political communication, demonstrating their role in enhancing both the clarity of message delivery and emotional engagement with the audience.

Keywords: crisis speeches; presidential discourse; emotional and expressive devices; communication; rhetoric; shaping public opinion

Introduction

The role of the U.S. president extends beyond governance; it encompasses the symbolic representation of national unity and leadership. The manner in which a president communicates significantly influences public

perception and shapes the leader's image within the social consciousness. According to J. Pennycook & D.G. Rand (2019) and J. Endres (2020), effective political communication plays a critical role in forming a positive

Suggested Citation:

Savchuk, V. (2024). Communicative techniques of the U.S. presidents for effective nation leader image formation in social consciousness. *Society. Document. Communication*, 9(2), 51-60. doi: 10.69587/sdc/2.2024.51.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author

image of the president, with public speeches serving as the cornerstone of such communication. Thus, the creation of a national leader's image is a key task for any U.S. president.

The evolution of communication strategies among U.S. presidents has mirrored technological advancements, from formal addresses to the use of radio, television, and social media. Each medium, as highlighted by C. Panagopoulos (2020), has its own set of techniques, with public speeches remaining the central tool for engaging with society. Presidential speeches require clear, accessible communication that reflects the political views and expectations of the public, especially during crises.

Researchers such as T. Pramadya & A.D. Rahmanhadi (2021) have shown that a president's rhetoric reflects ideological stances and reinforces their image as a unifying figure. F. Ghasemi (2020) emphasizes the importance of rhetorical devices, including ethos, logos, and pathos, in presidential speeches, noting how these elements contribute to shaping a competent and trustworthy image. By combining ethical appeals with emotional and logical arguments, presidents effectively engage their audience, creating a strong rhetorical impact.

In analysing the impact of rhetoric on power dynamics, M. Susilowati & M. Ulkhasanah (2021) demonstrated how U.S. presidents employ language to influence beliefs, especially during crises. Similarly, K. Gonzalez-Ramos (2023) highlighted the use of crisis rhetoric by comparing the speeches of U.S. and Mexican presidents. These studies underscore the importance of strategic communication in solidifying the president's role as a stable and reliable leader during challenging times.

Y. Boussaid (2022) explored conceptual metaphors in presidential speeches, specifically identifying metaphors of struggle and light used by Joe Biden and George Washington. The study shows how metaphors function as persuasive tools, helping shape public perception of leadership. Additionally, D. Hamed (2021) conducted corpus analysis of presidential speeches, revealing shifts in political priorities through the frequency of key words related to economy, security, and justice. Stylistic devices, including metaphors, rhetorical figures, and tropes, also play a significant role in enhancing the emotional and semantic weight of presidential speeches. According to E. Pelenyte & J. Grigaliūnienė (2021), such devices are crucial for creating emotional resonance and influencing public opinion, particularly in the context of national security and identity. D. Hall (2022) further supported this by highlighting how U.S. presidents use language to reinforce national identity during security crises.

Research by S. Moore-Berg *et al.* (2020) shows that exaggerated metaperspectives in political rhetoric can lead to increased polarization, demonstrating the importance of using language to unify rather than divide. This reflects the broader need for presidents to effectively manage their image and foster national unity through their communication strategies, especially in highly polarized political climate. In light of these

findings, the current research aimed to analyse the communicative techniques used by U.S. presidents to create an effective image in the social consciousness. By examining key rhetorical strategies and their impact on public trust, this study contributed to the understanding of the role communication plays in political leadership and its influence on political stability and public opinion. The primary objectives were to identify and evaluate the communicative techniques that U.S. presidents employed to build a positive image and secure citizen support, ultimately contributing to democratic leadership.

Materials and Methods

The methodology for analysing the crisis speeches of Donald Trump, Joe Biden, and Barack Obama was grounded in a systematic and quantitative approach, enriched by established rhetorical and discourse analysis frameworks. The initial stage of the study involved the careful selection of speeches based on specific criteria related to crisis situations in which the president's image did not experience a significant decline but had the potential to improve. Furthermore, the emotional potential of the speeches was considered, those with a high capacity to evoke an emotional response were prioritized, as such features are essential in maximizing the impact on the audience.

Once the speeches were selected, they were deconstructed into stylistic units, enabling the identification of rhetorical devices at three levels: phonetic (e.g., alliteration), lexical (e.g., metaphors and epithets), and syntactic (e.g., rhetorical questions and repetition). These devices were classified based on modern rhetorical theories (O'Hair *et al.*, 2022), which provided a structured approach for analysing the rhetorical strategies used by each president.

Among the general scientific methods employed in the study were abstraction and generalization, which helped build the theoretical foundation and formulate broad conclusions. These methods allowed for the isolation of the main research aspects and the formulation of general findings based on them. In addition, analysis and synthesis were crucial in breaking down the speeches into individual elements and reassembling them to form a comprehensive understanding of the communicative strategies used. This approach allowed for a detailed examination of each part of the speech and how they worked together to create a cohesive and positive image. The method of comparison was also used to assess the effectiveness of various language means in shaping this positive image, highlighting which techniques and strategies were most effective in different contexts.

After the rhetorical devices were identified and categorized, each instance was manually logged into a dataset for each president. The findings were then compiled into a table that included the president's name, the type of rhetorical device, its frequency, and its level (phonetic, lexical, or syntactic). To ensure accuracy and

comparability across speeches of varying lengths, a standard formula was applied to calculate the relative frequency of each device:

$$F = \frac{n}{N} \times 100, \quad (1)$$

where F represents the relative frequency of a given device; n is the number of times the device was used; and N is the total word count of the speech. The normalization to 100 words enabled accurate comparisons across texts of different lengths.

The study was informed by critical discourse analysis, exploring how rhetorical strategies influence public perception in crisis communication. This comprehensive approach to analysing rhetorical techniques across various communication forms allowed the study to reveal how presidents use language to shape their public image and manage crises effectively.

Results

The predominant focus on emotional impact in public speeches is reflected in the crisis speeches of the U.S.

presidents through the deliberate selection of various language means and their semantic and stylistic combinations. Particularly, T. Hajdukova (2024) highlighted how deliberate language means selection and their semantic-stylistic combinations are crafted to appeal to the emotional structures of the human psyche, ultimately influencing the unconscious aspects of speech perception. This explains the high degree of saturation of crisis speeches with linguistic emotionally expressive means and techniques at phonetic, lexical, and syntactical levels. Some research findings by S. Westwood *et al.* (2020), and D. Hall (2022), revealed that the emotional form of expression changes the entire scheme of speech perception, acting on the mechanisms of thinking, memory, attention, facilitating the integration of information into the recipient's consciousness.

The analysis of crisis speeches by D. Trump, J. Biden, and B. Obama, the results of which presented in Table 1 below, shows that language means and stylistic devices at phonetic, lexical, and syntactic levels used to enhance the emotional and psychological impact of the speech.

Table 1. The frequency of stylistic devices for the crisis speeches of Donald Trump, Joe Biden, and Barack Obama (in relative percentages)

Stylistic Device	Donald Trump (%)	Joe Biden (%)	Barack Obama (%)
Phonetic Level			
Alliteration	14.5	13.3	15.4
Lexical Level			
Metaphor	24.1	24.0	24.2
Epithet	18.1	22.7	22.0
Simile	21.7	21.3	20.9
Hyperbole	16.9	17.3	16.5
Syntactical Level			
Antithesis	10.8	10.7	11.0
Anaphora	9.6	13.3	9.9
Parallelism	14.5	17.3	12.1
Enumeration	24.1	25.3	24.2
Polysyndeton	12.0	12.0	12.1
Contrast	13.3	13.3	13.2
Juxtaposition	10.8	10.7	11.0
Parallel Constructions	12.0	14.7	13.2
Epiphora	9.6	9.3	9.9
Gradation	8.4	8.0	8.8
Ring Repetition	6.0	5.3	6.6
Distant Repetition of Words	7.2	6.7	7.7
Rhetorical Question	18.1	18.7	17.6

Source: created by the author based on a selection of crisis speeches by Donald Trump, Joe Biden, and Barack Obama

Among the most frequently used language devices at the phonetic level by all three presidents was alliteration. The group of lexical and stylistic devices most often employed by D. Trump included metaphor and epithet, while J. Biden tended to intensify his speech with metaphors, epithets, and allusions. Metaphors and epithets typically predominated in B. Obama's speeches. The most

frequent stylistic devices at the syntactic level for all the presidents were parallel constructions, gradation, enumeration, various types of repetitions, antithesis, emotional contrast, polysyndeton, and rhetorical questions.

The most frequent language devices used in the crisis speeches of D. Trump, J. Biden, and B. Obama were analysed. At the phonetic level, one of the most



frequently encountered devices was alliteration, which served as a special stylistic tool aimed at creating an additional musical effect in the statement. In modern rhetorical theories, it is well known that alliteration serves as a means of additional emotional impact, acting as a kind of musical accompaniment to the main idea of the statement (O'Hair *et al.*, 2022). The study showed that the stylistic device highlighted words linked by alliteration, giving them a certain intonational significance. In this way, the presidents managed to draw the audience's attention to the most important words and exert a certain type of emotional impact. For example, when addressing the need for a quick response to the COVID-19 pandemic, Donald Trump used resonant words like "comprehensive confront confident" to achieve a greater emotional effect and psychological impact on his listeners: "We are marshalling the full power of the federal government and the private sector to protect the American people. This is the most aggressive and comprehensive effort to confront a foreign virus in modern history. I am confident that by counting and continuing to take these tough measures we will significantly reduce the threat to our citizens and we will ultimately and expeditiously defeat this virus" (Trump, 2020).

In each crisis speech, the president expressed a certain idea through emotive vocabulary. To convey such ideas, the presidents had to select the most resonant vocabulary. It was observed that certain combinations of sounds in such vocabulary acted as emotional amplifiers, appealing to the audience's value systems, and were capable of not only "assigning" a range of personal qualities to the speaker but also of exerting a profound emotional impact on the listener.

For instance, when discussing the need to unite the nation during an economic crisis, Barack Obama used resonant words like "rebuild, renew, recover" to achieve a greater emotional effect and psychological impact on his listeners: "This year in this election we are called to reaffirm our values to renew our commitments and to recover the spirit that has always carried us forward. Yes, we can rebuild, renew, and recover" (Obama, 2010).

When addressing the topic of combating the COVID-19 pandemic, Joseph Biden spoke about the need to unite efforts to overcome the pandemic, emphasizing that vaccination was a key element in the fight against COVID-19: "This is a pandemic of the unvaccinated. We cannot allow these actions to stand in the way of protecting the large majority of Americans who have done their part and want to get back to life as normal. As your President, I'm announcing tonight a new plan to require more Americans to be vaccinated to combat those blocking public health" (Biden, 2021). This example was noteworthy primarily because of the simultaneous use of several stylistic devices alongside the metaphor. Firstly, the metaphor in the phrase "pandemic of the unvaccinated" helped create a vivid image, enhancing the importance of the speech's subject for listeners.

Secondly, the rhetorical questions "What more is there to wait for? What more do you need to see?" drew the audience's attention to key points of the speech, emphasizing the urgency and importance of vaccination. Thirdly, the statement gained additional effect through a series of epithets and allusions, characterizing both the seriousness of the pandemic situation and the actions of the government: "I'm announcing tonight a new plan to require more Americans to be vaccinated to combat those blocking public health" (Biden, 2021). Thus, President Biden used metaphors, rhetorical questions, and epithets to enhance the emotional impact and highlight key aspects of his speech.

This combination was characteristic of the speeches of other presidents, which undoubtedly gave the right to assert common principles in constructing speeches to intensify the persuasive effect and thereby enhance the perception of the president's image. For example, B. Obama, discussing the economic situation, used metaphors and comparisons to describe the complexity of the tasks facing the country: "The economy is like a patient recovering from a severe illness. It is weak to be sure but clearly recovering. The economy is going to make it. This means that our short-term focus can shift from crisis management to working to do all that we can to make the recovery as speedy as possible" (Obama, 2010).

This example also demonstrated the simultaneous use of several stylistic devices. Firstly, the metaphor "The economy is like a patient recovering from a severe illness" helped create a vivid figurative comparison, allowing the audience to better understand and feel the state of the economy. Secondly, the comparison "It is weak to be sure but clearly recovering" emphasized the duality of the situation, highlighting positive changes despite current difficulties. Additional effect was given to the statement by phrases such as "The economy is going to make it" and "our short-term focus can shift from crisis management to working to do all that we can to make the recovery as speedy as possible," which not only reassured the audience but also instilled confidence in the government's actions. Thus, President Barack Obama used metaphors, comparisons, and confident assertions to enhance emotional impact and draw attention to important aspects of his speech, thereby strengthening the image of a competent and responsible leader.

One of the most common stylistic devices at the lexical level was the metaphor. As noted by G. Pelenytė & J. Grigaliūnienė (2021), this stylistic device involves transferring the name from one object, subject, person, or phenomenon to another that is similar to the first in some respect. The author emphasizes the significant role of metaphor in shaping meaning and enhancing the impact of language in crisis speeches. In the context of US presidents' crisis speeches, the metaphorical use of words and expressions was particularly notable. This study proved the crucial role of the device in creating the desired image for each president. Several examples

from the crisis speeches of the analysed presidents demonstrated the use of the metaphor.

Discussing the fight against the COVID-19 pandemic, Joseph Biden emphasized that it was a "pandemic of the unvaccinated," using a metaphor to highlight the problem: "This is a pandemic of the unvaccinated. We cannot allow these actions to stand in the way of protecting the large majority of Americans who have done their part and want to get back to life as normal. As your president, I'm announcing tonight a new plan to require more Americans to be vaccinated to combat those blocking public health" (Biden, 2021). This example was particularly interesting for the use of the metaphor "pandemic of the unvaccinated," which allowed President Biden to draw attention to the importance of vaccination. Firstly, the metaphor underscored the seriousness of the situation; secondly, it emphasized the responsibility of each individual for the common good. Additionally, the use of emotionally charged expressions such as "combat those blocking public health" enhanced the emotional impact on the audience, highlighting the necessity of collective efforts in fighting the pandemic.

Describing the economic situation, B. Obama used metaphors and comparisons to describe the complexity of the tasks facing the country: "The economy is like a patient recovering from a severe illness. It is weak to be sure but clearly recovering. The economy is going to make it. This means that our short-term focus can shift from crisis management to working to do all that we can to make the recovery as speedy as possible" (Obama, 2010). This example was interesting primarily for the simultaneous use of several stylistic devices against the background of the metaphor. Firstly, the metaphor expressed in the phrase "The economy is like a patient recovering from a severe illness" helped create a vivid figurative comparison, allowing the audience to better understand and feel the state of the economy. Secondly, the comparison "It is weak to be sure but clearly recovering" emphasized the duality of the situation, highlighting positive changes despite current difficulties. Thirdly, additional effect was given to the statement by phrases such as "The economy is going to make it" and "our short-term focus can shift from crisis management to working to do all that we can to make the recovery as speedy as possible," which not only reassured the audience but also instilled confidence in the government's actions. Thus, Barack Obama used metaphors, comparisons, and confident assertions to enhance emotional impact and draw attention to important aspects of his speech, thereby strengthening the image of a competent and responsible leader.

Among the most frequent stylistic devices at the syntactic level noted in the speeches of D. Trump, J. Biden, and B. Obama were antithesis, various types of repetitions, parallelism of syntactic constructions, gradation, enumeration, distant word repetition, rhetorical questions, and others. According to M. Boussaid (2022), in

addition to the general compositional function of forming the compositional-logical scheme of discourse and serving as a means of developing "thematic" cores, each of these devices had its own peculiarities in terms of syntactic organization and additional functions. These functions contributed to achieving psychological goals, such as easing perception, arousing interest, emphasizing content, and shaping an evaluative attitude toward it.

As the analysis of the presidents' crisis speeches showed, the stylistic syntactic devices used in these speeches were quite diverse. For any public speech, the syntactic structuring of the speech played a crucial role, since, as F. Ghasemi (2020) states, it helps in realizing the pragmatic direction of the spoken word. The study of syntactic constructions provided an understanding of their peculiar functioning in the genre of crisis discourse and also pointed out the advantages of one or another syntactic construction. Moreover, several syntactic devices stemmed from oral speech, making them adequately perceivable during a live address.

Antithesis as a stylistic device was used to create a contrasting characteristic of the described phenomenon and was a common stylistic device in the speeches of the analysed presidents. The lexical basis of this device consisted of antonyms. Such use of antithesis in its "pure" form could be compared to a "word game" that the speaker resorted to in order to enhance the emotional and psychological impact of the contrast.

Several examples of antithesis were observed in the speeches analysed. In discussing national achievements in the economic field over the past few years, President B. Obama effectively contrasted what had been achieved with what had been avoided. Specifically, the United States overcame the financial crisis, and contrary to forecasts and expectations, high rates of economic growth emerged. At the linguistic level, this passage demonstrated the effective use of the opposition of antonyms "decline" and "growth", as well as "barriers" and "boundaries", which can also be attributed to the group of contextual antonyms: "Instead of finding barriers we have crossed boundaries. Instead of decline we have seen economic growth beyond all expectation" (Obama, 2010).

In criticizing Donald Trump's actions, Joseph Biden referred to his opponent's approach to the COVID-19 pandemic as "harmful" and "dangerous," thus effectively achieving opposition through a series of antonyms forming a binary opposition of "helpful vs harmful" and "safe vs dangerous": "It is easy to spread misinformation about the virus. But this is not helpful it is harmful. It is not safe it is dangerous. And Americans see through it" (Biden, 2021).

Biden's statements instilled in voters the idea that his main opponent did not care about the health and safety of the American nation and that he was not interested in achieving general well-being. In contrast, Biden's goal was to unite all Americans and achieve equal opportunities for a healthy life. To enhance the emotional

impact in this passage, antonymic verbs “unite and divide,” as well as nouns “health and disease,” were used, acquiring opposition significance in this context: “Our goal is to unite Americans in health not divide them with disease” (Biden, 2021).

In discussing successes in combating the economic crisis, B. Obama used antithesis to emphasize the contrast between achieved results and previous difficulties. In the example below, the stylistic device of antithesis was realized through the use of lexemes with directly opposite meanings: progress vs setback, hope vs despair, success vs failure. Through antithesis, President B. Obama explained to listeners the advantages of the economic policies being implemented: “Let me be clear about what this is: this is progress not setback. It is hope not despair. It is success not failure. Our economic policies are lifting people out of hardship and into opportunity” (Obama, 2010).

In the crisis speeches of the analysed U.S. presidents, the technique of emotional contrast was often used instead of the classical method of antithesis built on the comparison of parallel constructions and antonyms. In these cases, it was not strict antonyms that were opposed, but rather words and phrases with positive and negative evaluativeness attributed within the context. These evaluations were provided by the speaker based on an arbitrary interpretation of various phenomena and facts. The technique of emotional contrast served as a way of actualising the content-evaluative elements of speech, leading to the enhancement of the effect of “psychological pressure”: “Every political campaign – every political victory – is empty unless it is used for some great purpose. In this election we have a chance not just to elect a new President but to set a new direction for America” (Obama, 2010).

The use of the construction “not just ... but” in J. Biden’s speech played an important role in shaping his image in the public consciousness. This construction allowed Biden to clearly contrast two concepts, emphasizing that one of them was more important in the current situation. For example, when he stated that the issue of vaccination concerns “... not just about freedom or personal choice. It’s about protecting yourself and those around you, the people you work with, the people you care about, the people you love,” (Biden, 2021), he emphasized that while freedom and personal choice were important, health protection was a priority in times of crisis. This technique enhanced the main idea of the speech, creating the impression that both aspects were significant, but one was more substantial in the current context. This approach helped the audience understand that health protection was a key task that should precede individual rights in times of crisis. Such an approach formed a positive image of a leader who cared about the well-being of his citizens. Furthermore, the contrast and emphasis on the more important aspect evoked an emotional reaction from the listeners, as they felt that

their actions, particularly vaccination, had a significant impact on the public good. This contributed to shaping J. Biden’s image as a responsible and far-sighted leader who called for unity and joint efforts in fighting the crisis.

In B. Obama’s crisis speeches, the concept of “crisis” was contrasted with the concept of “opportunity,” which, in his view, served as a combination of ideas and American ideals to achieve a decent life for all American citizens: “Two months from today the people of this country will face not just a crisis but an opportunity – a set of ideas and ideals that will shape the lives of our families for decades to come” (Obama, 2010).

Thus, the use of the technique of emotional contrast, considered a kind of antithesis, contributed to the fact that the semantic movement of the speech excluded the possibility for the audience to form their own evaluation, as the presidents pre-set the choice in the actualized evaluative components. This construction of speech helped the president impose his opinion and express his position on a particular issue, as well as establish himself as a reliable politician, the bearer of all possible positive qualities.

Discussion

The results of the study indicated that presidential rhetoric plays a crucial role in shaping a positive public image, especially during times of crisis. The analysis of speeches by U.S. Presidents Donald Trump, Joe Biden, and Barack Obama demonstrated that linguistic strategies aimed at emotional appeal are key to strengthening leadership and public perception. These findings align with numerous studies in the field of political communication, though certain emphases may differ. This section reviews the results of other studies and compares them with own findings to provide a more comprehensive view of contemporary trends in political discourse.

N. Al-Khawaldeh *et al.* (2023) emphasizes in his research that the deliberate use of emotional language in political speeches is designed to affect the unconscious aspects of speech perception. This allows political leaders to influence audiences on a deeper level by manipulating their emotions. Study corroborates this approach, particularly noting that the speeches of D. Trump, J. Biden, and B. Obama were saturated with emotionally charged linguistic devices across all levels – phonetic, lexical, and syntactic. This suggests that the emotional component is a key tool in shaping a positive image of a leader during crises. S. Westwood *et al.* (2020) argues that emotional expression in political speeches alters the way audiences process information, affecting memory, attention, and cognitive processes. Findings support this claim, as phonetic devices such as alliteration and rhythm help audiences retain key messages. For instance, the use of rhythmic structures in B. Obama’s speeches enhanced the emotional engagement of listeners. This is consistent with S. Westwood *et al.* (2020) conclusions, reaffirming that emotional expression enhances the cognitive processing of information by the audience.

G. Pelenyte & J. Grigaliūnienė (2021) highlights the importance of metaphors and other lexical tools in political speeches to create emotional resonance. Research found that all three presidents frequently used metaphors to explain complex political issues. For example, metaphors of “battle” and “light” were employed to underscore themes of fighting crises and hope for a better future. This supports Pelenyte’s assertion that metaphors are effective cognitive tools for influencing public opinion. J. Tan (2024) explores the influence of social media on political engagement among younger generations, emphasizing that these platforms play a significant role in shaping political consciousness. While research focuses on the official speeches of presidents, J. Tan’s findings suggest that digital platforms significantly impact the political process. This opens new avenues for investigating how leaders adapt their rhetorical strategies to new media environments.

T. Hajdukova (2024) focuses on the manipulation of public opinion in the online space during elections, highlighting the use of bots, disinformation, and micro-targeting. Her research shows that digital technologies can be powerful tools for influencing citizens’ emotions. This study confirmed that the manipulation of linguistic devices in presidential crisis speeches helps reinforce their positive image. However, research focused more on traditional rhetorical techniques, underlining the need for further exploration of the interplay between digital and classical forms of communication. B. García-Orosa (2021) analysed the impact of disinformation and social media on political communication, calling it the “fourth wave of digital democracy.” The author argues that these digital tools can significantly affect citizens’ media literacy and distort public opinion. Study supports this claim, as crisis speeches by presidents also employ manipulative strategies, presented in Table 1 through various means of different language levels, to influence audience perceptions of their competence.

M. Deseriis (2021) offers a new theoretical framework that explains the impact of digital platforms on political representation. The author suggests that these platforms have changed the way politicians communicate with their audiences. Research emphasizes the traditional approach to speech communication, but the realities of modern digital media, as described by M. Deseriis (2021), demonstrate the importance of studying the adaptation of political rhetoric to new conditions. J. Firmstone & S. Coleman (2015) highlight the importance of online communications for public participation in political processes, particularly at the local government level. This confirms the significance of digital platforms in the political process. Although research focuses on presidential speech strategies, the findings of these authors underscore that digital communication spaces open new possibilities for civic engagement and shaping political opinion.

Finally, C. Frost (2020) investigates the phenomenon of “political ventriloquism,” where the use of bots and

simulated public opinion distorts democratic processes. Her conclusions highlight the importance of digital tools for manipulating public opinion, especially in modern election campaigns. This opens new avenues for comparing traditional and digital methods of political manipulation that interact within contemporary political communication. Research by N. Al-Khawaldeh *et al.* (2023), who examined persuasive strategies in Biden’s inauguration speech, provided insights into the emotional and rhetorical power of presidential communication in times of crisis. Similarly, J. Viala-Gaudefroy (2019) analysed neoliberal metaphors in U.S. presidential discourse from Ronald Reagan to Donald Trump, offering context for how economic metaphors play a role in managing crises.

Previous research by V. Savchuk (2023) has expanded the understanding of U.S. presidents’ electoral discourse, offering insights into how language means contribute to shaping political and public personas in high-pressure contexts. The works of C. Panagopoulos (2021), and J. Easaw *et al.* (2022), on public opinion and polling provided valuable context for understanding how rhetorical strategies in speeches interact with public sentiment and polling data. Finally, the research by F. Zappettini & M. Rezazadah (2023), which examined communication strategies on Twitter during the U.S. withdrawal from Afghanistan, underscored the importance of adapting rhetorical strategies across different platforms.

Thus, the results of study align with many existing studies while revealing new aspects of the interaction between phonetic, lexical, and syntactic devices in crisis communication. The analysis of Trump, Biden, and Obama’s rhetoric underscores how U.S. presidents use language to create a positive image, build trust, and establish emotional connections with their audiences. This study also contributes new insights into the evolution of political communication in the digital age.

Conclusions

The study of crisis speeches by U.S. Presidents Donald Trump, Joe Biden, and Barack Obama highlighted the crucial role of skillful use of stylistic devices at all levels of linguistic structure in effective political communication. The successful application of such techniques not only enhanced the emotional impact on the audience but also served as a tool for creating and reinforcing a positive image of the leader, especially during challenging crisis situations.

At the phonetic level, alliteration played a significant role in shaping the emotional tone of the speech, helping to create a rhythm that emphasized key points. The research showed that through alliteration, the presidents could make their speeches more memorable and emotionally charged. The use of rhythmic word repetitions, as seen in Donald Trump’s speeches on the COVID-19 pandemic, added persuasiveness to the statements and provided an additional psychological impact. At the lexical level, metaphor emerged as the

most prevalent stylistic device, as it allowed for the creation of vivid images and facilitated the understanding of complex ideas. Metaphors were used to underscore the significance of key issues, such as the fight against the pandemic, economic challenges, or matters of national unity. For instance, Joe Biden's metaphor of a "pandemic of the unvaccinated" was an effective tool to highlight the gravity of the situation and the collective responsibility of citizens.

Syntactic devices such as antithesis, parallelism, and anaphora enabled the presidents to reinforce their arguments and make them more structured and convincing. Antithesis, in particular, was frequently used to create a contrast between achievements and challenges, helping to highlight the positive aspects of government actions and offering the audience hope for overcoming difficulties. Additionally, constructions like parallelism and anaphora contributed to the logical development of the speech and made it easier for the audience to follow, rendering the messages clearer and more accessible.

As a result, the study has concluded that the effective use of stylistic devices in crisis speeches not only facilitates the transmission of information but also ensures an emotional connection with the audience, increasing the level of trust in the leader. This allowed the presidents to shape the image of a competent, responsible, and decisive statesman capable of handling challenges.

The prospects for further research into this field open up wide possibilities for analysing and expanding

the understanding of the role of stylistic devices in political communication. One potential direction is a comparative analysis of the use of stylistic techniques in the speeches of leaders from different countries, which would allow for the identification of cultural differences and the distinctive features of national communication strategies. Another promising area involves examining how political rhetoric changes depending on social contexts, such as during election campaigns, crises, or international negotiations.

Moreover, the shift in political context or the topic of speeches also merits attention. For instance, researchers could explore how leaders adapt their rhetoric to different political or crisis conditions, selecting specific stylistic devices based on the current situation. Such studies could deepen the understanding of the dynamics of political communication and its influence on public opinion and political culture.

Finally, a promising area of research is the role of stylistic devices in the context of global political processes, such as populism, climate change, or international crises, to understand how political leaders aim to influence a global audience through emotionally charged rhetoric.

■ Acknowledgements

None.

■ Conflict of Interest

None.

■ References

- [1] Al-Khawaldeh, N.N., Rababah, L.M., Khawaldeh, A.F., & Banikalef, A.A. (2023). The art of rhetoric: Persuasive strategies in Biden's inauguration speech: A critical discourse analysis. *Humanities and Social Sciences Communications*, 10, article number 936. doi: [10.1057/s41599-023-02450-y](https://doi.org/10.1057/s41599-023-02450-y).
- [2] Biden, J. (2021). *Remarks by President Biden on fighting the COVID-19 pandemic*. Retrieved from <https://www.whitehouse.gov/briefing-room/speeches-remarks/2021/09/09/remarks-by-president-biden-on-fighting-the-covid-19-pandemic-3/>.
- [3] Boussaid, Y. (2022). Metaphor-based analysis of Joe Biden's and George Washington's inaugural speeches. *International Journal of English Linguistics*, 12(3), 1-17. doi: [10.5539/ijel.v12n3p1](https://doi.org/10.5539/ijel.v12n3p1).
- [4] Deseriis, M. (2021). Rethinking the digital democratic affordance and its impact on political representation: Toward a new framework. *New Media & Society*, 23(8), 2452-2473. doi: [10.1177/1461444820929678](https://doi.org/10.1177/1461444820929678).
- [5] Easaw, J., Fang, Y., & Heravi, S. (2022). Using polls to forecast popular vote share for US presidential elections 2016 and 2020: An optimal forecast combination based on ensemble empirical model. *Journal of the Operational Research Society*, 74(3), 905-911. doi: [10.1080/01605682.2022.2101951](https://doi.org/10.1080/01605682.2022.2101951).
- [6] Endres, K. (2020). Targeted issue messages and voting behavior. *American Politics Research*, 48(2), 317-328. doi: [10.1177/1532673X19875694](https://doi.org/10.1177/1532673X19875694).
- [7] Firmstone, J., & Coleman, S. (2015). Public engagement in local government: The voice and influence of citizens in online communicative spaces. *Information, Communication & Society*, 18(6), 680-695. doi: [10.1080/1369118X.2014.986180](https://doi.org/10.1080/1369118X.2014.986180).
- [8] Frost, C. (2020). The power of voice: Bots, democracy and the problem of political ventriloquism. *Journal of Political Power*, 13(1), 6-21. doi: [10.1080/2158379X.2019.1701831](https://doi.org/10.1080/2158379X.2019.1701831).
- [9] García-Orosa, B. (2021). Disinformation, social media, bots, and astroturfing: The fourth wave of digital democracy. *Profesional de La Informacion*, 30(6), article number e300603. doi: [10.3145/epi.2021.nov.03](https://doi.org/10.3145/epi.2021.nov.03).
- [10] Ghasemi, F. (2020). Persuasive language in presidential speeches: A contrastive study based on Aristotelian rhetoric. *The Buckingham Journal of Language and Linguistics*, 12, 19-38. doi: [10.5750/bjll.v12i.1872](https://doi.org/10.5750/bjll.v12i.1872).
- [11] Gonzalez-Ramos, K. (2023). *Times of crisis: A comparative discourse analysis of U.S. and Mexican presidential rhetoric*. (Master's thesis, Louisiana State University, Baton Rouge, USA). doi: [10.31390/gradschool_theses.5771](https://doi.org/10.31390/gradschool_theses.5771).

- [12] Hajdúková, T. (2024). Techniques for manipulating public opinion in the online space during an election campaign as a hybrid threat. *Academic Journal of Interdisciplinary Studies*, 13(1), 14-23. doi: [10.36941/ajis-2024-0002](https://doi.org/10.36941/ajis-2024-0002).
- [13] Hall, J. (2022). "Winning" the forever wars? Presidential rhetoric and US ontological (in)security. *Global Studies Quarterly*, 2(4), article number ksac067. doi: [10.1093/isagsq/ksac067](https://doi.org/10.1093/isagsq/ksac067).
- [14] Hamed, D. (2021). Keywords and collocations in US presidential discourse since 1993: A corpus-assisted analysis. *Journal of Humanities and Applied Social Sciences*, 3(2), 137-158. doi: [10.1108/JHASS-01-2020-0019](https://doi.org/10.1108/JHASS-01-2020-0019).
- [15] Moore-Berg, S.L., Ankori-Karlinsky, L.O., Hameiri, B., & Bruneau, E. (2020). Exaggerated meta-perceptions predict intergroup hostility between American political partisans. *Proceedings of the National Academy of Sciences of the United States of America*, 117(26), 64-72. doi: [10.1073/pnas.2001263117](https://doi.org/10.1073/pnas.2001263117).
- [16] O'Hair, D., Rubenstein, H., & Stewart, R. (2022). *A pocket guide to public speaking*. Boston: Bedford/St. Martin's.
- [17] Obama, B. (2010). *Treatment and prevention: Ending the Great Recession and ensuring that it doesn't happen again*. Retrieved from <https://obamawhitehouse.archives.gov/administration/eop/cea/speeches-testimony/treatment-and-prevention>.
- [18] Panagopoulos, C. (2020). *Bases loaded: How US presidential campaigns have changed and why it matters*. New York: Oxford University Press. doi: [10.1093/oso/9780197533062.001.0001](https://doi.org/10.1093/oso/9780197533062.001.0001).
- [19] Panagopoulos, C. (2021). Polls and elections: Accuracy and bias in the 2020 US general election polls. *Presidential Studies Quarterly*, 51(1), 214-227. doi: [10.1111/psq.12710](https://doi.org/10.1111/psq.12710).
- [20] Pelenytė, G., & Grigaliūnienė, J. (2021). Tropes and rhetorical figures in simultaneous interpreting of presidential speeches. *Vertimo Studijos*, 14, 71-85. doi: [10.15388/VertStud.2021.5](https://doi.org/10.15388/VertStud.2021.5).
- [21] Pennycook, G., & Rand, D.G. (2019). Cognitive reflection and the 2016 US presidential election. *Personality and Social Psychology Bulletin*, 45, 224-239. doi: [10.1177/0146167218783192](https://doi.org/10.1177/0146167218783192).
- [22] Pramadya, T.P., & Rahmanhadi, A.D. (2021). A day of history and hope: A critical discourse analysis of Joe Biden's inauguration speech. *Rainbow: Journal of Literature, Linguistics and Culture Studies*, 10(2), 85-94. doi: [10.15294/rainbow.v10i2.45383](https://doi.org/10.15294/rainbow.v10i2.45383).
- [23] Savchuk, V. (2023). Language means for emphasizing U.S. presidents' electoral discourse. *Theoretical and Didactic Philology*, 36, 175-186. doi: [10.31470/2309-1517-2023-36-175-186](https://doi.org/10.31470/2309-1517-2023-36-175-186).
- [24] Susilowati, M., & Ulkhasanah, W. (2021). *Ideology and power in presidential speech*. *Advances in Social Science, Education and Humanities Research*, 529, 860-867.
- [25] Tan, J.J. (2024). Social media political information use and political participation of the net generation. *E-Bangi Journal of Social Science and Humanities*, 21(1), 198-211. doi: [10.17576/ebangi.2024.2101.17](https://doi.org/10.17576/ebangi.2024.2101.17).
- [26] Trump, D. (2020). *Remarks by President Trump in address to the nation*. Retrieved from <https://trumpwhitehouse.archives.gov/briefings-statements/remarks-president-trump-address-nation/>.
- [27] Viala-Gaudefroy, J. (2019). Neoliberal metaphors in presidential discourse from Ronald Reagan to Donald Trump. *Angles*, 8, 1-27. doi: [10.4000/angles.625](https://doi.org/10.4000/angles.625).
- [28] Westwood, S., Messing, S., & Lelkes, Y. (2020). Projecting confidence: How the probabilistic horse race confuses and demobilizes the public. *Journal of Politics*, 82(4). doi: [10.1086/708682](https://doi.org/10.1086/708682).
- [29] Zappettini, F., & Rezazadah, M. (2023). Communication strategies on Twitter: A critical discourse analysis of the US withdrawal from Afghanistan. *International Journal of Strategic Communication*, 18(2), 115-131. doi: [10.1080/1553118X.2023.2280555](https://doi.org/10.1080/1553118X.2023.2280555).

Комунікативні техніки президентів США як засіб ефективного формування образу лідера нації у соціальній свідомості

Валерій Савчук

Викладач

Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0009-0001-6407-2463>

Анотація. Дослідження кризових виступів президентів США Дональда Трампа, Джо Байдена та Барака Обама є важливим через зростаючу роль ефективної політичної комунікації у сучасному суспільстві. Аналіз мовних засобів, що використовуються в цих промовах, допомагає зрозуміти, як лідери впливають на аудиторію та формують свій позитивний імідж. Мета дослідження полягала у виявленні ключових мовних засобів, які використовують президенти для ефективного спілкування з аудиторією та формування позитивного образу лідера. Методологія дослідження базувалася на комплексному підході, що включав фонетичний, лексичний та синтаксичний аналіз текстів виступів. Застосовано семантичний аналіз для виявлення ключових мовних блоків, а також аналіз намірів для визначення комунікативних прийомів, які використовують президенти для впливу на аудиторію. Результати дослідження дозволили констатувати, що використання стилістичних засобів на фонетичному, лексичному та синтаксичному рівнях відіграє вирішальну роль у ефективності кризових промов президентів США Дональда Трампа, Джо Байдена та Барака Обама. На фонетичному рівні алітерація виявилася важливим засобом створення ритмічності для інтенсифікації емоційного впливу й акцентування ключових моментів промови. Цей прийом, що часто використовувався всіма трьома президентами, привернув увагу до важливих термінів, сприяючи кращому запам'ятовуванню та емоційному залученню слухачів. На лексичному рівні метафори та епітети були важливими для створення яскравих образів і спрощення складних питань. Метафори дозволяли президентам передавати абстрактні та багатогранні концепції у зрозумілий та емоційно насичений спосіб. Синтаксичні засоби, такі як антитеза, паралельні конструкції та повторення, підсилювали ключові повідомлення, надаючи промовам структурної ясності та емоційної глибини. Антитеза особливо ефективно висвітлювала контрасти між досягненнями та викликами. Такі риторичні засоби не тільки підвищували переконливість промов, але й зміцнювали образ президентів як рішучих та компетентних лідерів. Результати підкреслюють важливість стилістичних засобів у політичній комунікації, демонструючи їхню роль у покращенні як чіткості донесення повідомлень, так і емоційного залучення аудиторії.

Ключові слова: кризові промови; президентський дискурс; емоційно-експресивні засоби; комунікація; риторика; формування громадської думки



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 9, No. 2, 61-70

Article's History: Received: 19.12.2023 Revised: 29.04.2024 Accepted: 28.06.2024

UDC 316.77:378.091(477)

DOI: 10.69587/sdc/2.2024.61

Social communications as a factor of diversification of flexible learning trajectories

Oksana Pluzhnyk*

PhD, Associate Professor
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0000-0001-8780-8288>

Olena Khmelnytska

PhD in Pedagogical Sciences, Associate Professor
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0000-0002-0644-6201>

Larysa Tkachenko

PhD in Philological Sciences, Associate Professor
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0000-0001-6972-6350>

Yana Zlenko

Lecturer
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0009-0001-6052-7897>

Abstract. The modern educational paradigm requires considering learning as a dynamic and flexible process, not just the transfer of information. The growing complexity of society and rapid changes in the technological and information spheres require new approaches to learning that would promote the development of critical thinking, creativity and adaptive skills. In this context, understanding the role of social communications in shaping flexible educational trajectories becomes a key task for educators. The purpose of the study was to analyse current challenges and trends that determine the development of higher education in Ukraine. The study aimed to understand the mechanisms of social communications' influence on the flexibility of learning, considering the impact of globalisation, technological innovations and other modern vectors. The results of the study indicated how social communications influence the formation of flexible learning paths, identifying effective models of their use, problems and barriers. The article considered a wide range of current challenges and evolutionary changes that determine the future prospects of the higher education system in Ukraine. The analysis was based on the consideration of learning flexibility, which is becoming a key aspect in the context of global transformations, rapid development of technological innovations and constant changes in the labor market. Particular attention was paid to internationalisation strategies, highlighting their impact on higher education in the context of globalisation. The article examined modern forms of education, analysed their importance for providing quality and modern training aimed at responding to the challenges of the information society. The system of lifelong learning was

Suggested Citation:

Pluzhnyk, O., Khmelnytska, O., Tkachenko, L., & Zlenko, Ya. (2024). Social communications as a factor of diversification of flexible learning trajectories. *Society. Document. Communication*, 9(2), 61-70. doi: 10.69587/sdc/2.2024.61.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author

considered as a key element capable of providing students with constant updating of their knowledge and competencies throughout their lives. The author also considered the latest approaches to education, including the use of technology to optimise the educational process and develop key skills of students. A special aspect of the analysis was the issue of innovations in the educational process and the development of students' competencies, taking into account the diversity of their needs and the requirements of modern society. This study can help identify future trends and innovations in education. The practical significance of the study lies in the development of effective strategies for integrating social communications into the educational process, which contributes to the flexibility of learning and the adaptation of educational programs to the needs of students. The results can be used to improved teaching methods, improved interaction between participants in the educational process, and introduce innovative approaches that will help to better meet modern requirements and trends in education

Keywords: social interaction; globalisation; continuous professional development; educational technologies; information technologies; digital innovations

■ Introduction

Modern challenges, such as globalisation, technological innovation and changes in the labour market, necessitate a review of higher education strategies to respond effectively to these trends. One of the key themes is flexibility of learning, as it allows for adaptation to the individual needs of students and the requirements of modern society. The international integration of Ukrainian higher education into the European and global space is becoming an important aspect that requires a deep understanding and analysis of global trends. The challenges associated with integration determine the need to develop strategies that will ensure the high competitiveness of Ukrainian universities in the international context. It is necessary to thoroughly research and assess the impact of various factors on the higher education system in Ukraine. An in-depth analysis was necessary to identify the most important trends shaping the modern university space.

In the context of globalisation and increasing international competition, the analysis of global factors, such as transformations in global economic, socio-cultural and technological processes, is an important step in developing strategies for higher education. National specificities and needs should also be taken into account in order to adapt curricula and teaching methods to the conditions of the domestic labour market and socio-cultural environment. Analysing a wide range of studies conducted both nationally and internationally, it is possible to identify key aspects that shape current trends in the development of flexible learning. The role of social communications, the peculiarities of their impact on educational processes, as well as new requirements for adaptive skills of participants in the educational process has become the main focus of researchers.

V. Lugovyj *et al.* (2023) examined how globalisation, the Covid-19 pandemic, and military conflicts have affected higher education in Ukraine, with a particular focus on the role of social media in this context. The authors analysed how these factors have changed universities, including the impact on infrastructure, mass migration of students and faculty, and the transformation of communication processes in the educational

environment. They emphasised the importance of adapting social communications for the recovery and development of post-war higher education in Ukraine. The study helped to better understand how global and local crises affect social communications in educational processes and contributes to the development of strategies for the recovery and further development of educational institutions in the post-crisis period.

A. Sibruk *et al.* (2023) explored the role of higher education in the formation of responsible and self-sufficient individuals with critical thinking in the modern military and post-war society. The authors focused on the impact of social communications, in particular the use of information networks and the Internet, on the education and upbringing of young people. They explored how the integration of modern communication technologies into educational processes helps to develop critical thinking and information evaluation skills in students. As a result, the study emphasised the importance of social communications in the development of responsible individuals who can effectively navigate the information space. O. Orzhel *et al.* (2023) studied the cases of displaced universities that faced challenges after the outbreak of Russian aggression against Ukraine in February 2022. The authors analysed how social communications have influenced the adaptation of universities to wartime conditions and post-war reconstruction. They examine four modern university models such as traditional, civic, open, and European, focusing on the importance of the civic model for the development of displaced universities. The study also identified how effective communications management can help support displaced institutions, revise their missions and strategies, and plan for crisis management. The findings allowed for the development of recommendations to improve communication strategies and support universities in challenging environments.

N. Ponomarenko *et al.* (2022) noted that, despite the extremely difficult conditions, classical universities in Ukraine are transforming into research centres engaged in innovation and international cooperation to meet the

requirements of stakeholders and ensure the competitiveness of graduates and its own competitive position in the market of educational services. Research in this format helped universities adapt to modern requirements and increase their competitiveness through social communications, innovative development and international cooperation. The above studies made a significant contribution to the understanding of the transformation processes in higher education, especially in times of crisis, such as military conflicts and pandemics, and in the context of globalisation. It is highlighted how universities are adapting to new challenges by transforming their functions into research centres, introducing innovative practices and expanding international cooperation. Such a scientific discussion revealed the importance of the impact of external factors on the adaptation of universities, its ability to innovate and ensure the competitiveness of graduates in the global education market. However, questions remain about the specific mechanisms for implementing these transformations, the effectiveness of new models and strategies, and their long-term impact on the higher education system. It is necessary to further investigate how these changes will affect the quality of education, the level of training of students, and the ability of universities to cope with new challenges in the face of rapid change. The purpose of the study was to outline the mechanisms of social communication influence on the formation of flexible educational trajectories, taking into account the impact of globalisation, technological innovations and other modern vectors.

The objectives of the study were to examine the impact of social communications on the flexibility of learning, analyse current challenges and trends in the development of higher education in Ukraine, and assess the role of social communications in shaping educational strategies. The methodological basis of the study is the concept of flexible learning. To achieve the purpose of the article, the following methods of scientific cognition were used: literature analysis (including a review of scientific publications and regulatory documents to identify theoretical and practical knowledge about the role of social communications in flexible learning); dialectical method (to analyse the relationship between the impact of social communications on the flexibility of learning and the adaptation of educational trajectories); methods of synthesis and systematisation (to identify opportunities for integrating modern social communications into educational processes and their impact on educational models); methods of reflection and generalisation (to formulate recommendations for improving educational strategies and identify potential barriers to the implementation of flexible learning in the context of modern challenges).

The scientific innovation of the study lies in a new approach to analysing the role of social communications in the diversification and flexibility of learning trajectories, which is a relatively new approach in the context of modern educational changes.

■ Social and communication aspects of university education transformation

In the modern world, where technology and knowledge are rapidly evolving, university education is going through a period of great change. Education is gradually moving away from traditional teaching methods, which are no longer able to fully meet the requirements of modern society. New trends that emphasise the flexibility of learning go beyond the standard approach to knowledge transfer. They define new standards and learning formats that are becoming more adapted to the individual needs of students and the real requirements of the labour market.

V. Vyshkivska *et al.* (2022) believed, that the new information type of society has significantly changed approaches to the training of future professionals. The concept of creating new scientific knowledge, ideals and values that meet modern standards of professional training of specialists capable of innovation in their field of activity was increasingly being approved. This process not only involves replacing traditional pedagogical technologies with innovative ones, but also revising the goals and values of education. It also includes the replacement of technocratic relations in the teacher-student system with humanistic ones, as well as the transition to cooperation with students as active participants in the educational process. The research by M. Debych *et al.* (2023) showed, that the demand for university education is growing exponentially, and instead of the current 99 million students, there will be approximately 414 million in 2030.

M. Ajaja & A. Ostenda (2022) argued that a key goal of higher education at the beginning of the new century is to prepare graduates for life and work in a globalised world where local issues are inextricably linked to global ones. In this light, international and intercultural skills become extremely important, as does the ability to interact effectively with people from different cultures and to think at the local, national and global levels. Education is undergoing significant transformations caused by globalisation, rapid technological development and the need to adapt to new living and working conditions. An important component of these changes is flexible learning, which allows students to choose their own trajectory of development, adapting it to their own needs and interests. Social communications are becoming a key factor influencing the diversification of such trajectories, ensuring the effective exchange of information, experience and knowledge between participants in the educational process. This opens up new opportunities for personalising learning, increasing motivation and engagement, and creating innovative educational approaches that meet the demands of the times.

Changes in education are essential to ensure that university graduates are equipped not only with theoretical knowledge, but also with the skills necessary for successful professional activity in an era of rapid technological progress. These skills include critical thinking,

creative problem-solving, adaptability to change, and the ability to communicate and collaborate in an international environment. To achieve these goals, flexible learning in education is becoming a key element, as it offers a comprehensive approach aimed at creating an individualised, adaptive and open educational environment. The main idea is to provide students with the opportunity to choose their educational trajectory, taking into account their unique needs, interests and learning styles. This creates favourable conditions for the development of independence, critical thinking and creativity among students. Flexible learning in education is a comprehensive approach aimed at creating an individualised, adaptive and open educational environment. The main idea was to provide students with the opportunity to choose their own educational trajectory, taking into account their unique needs, interests and learning styles. This means that students have the opportunity to determine their own schedule, learning methods and even the subjects they study.

Flexibility includes various forms of learning, such as traditional classes, distance learning, project work, and other interactive methods. This creates favourable conditions for the development of independence, critical thinking and creativity among students. Flexible learning is also focused on the use of modern technologies that allow access to learning from anywhere and at any time. This is important, especially in the world, where rapid technological change affects the requirements for the educational process and the preparation of students for the future. This approach to learning helps students to develop adaptability, independence and skills to work in conditions of instability and uncertainty. Flexibility of learning has become important not only for students, but also for universities, which have to adapt to new challenges and introduce innovations in the educational process. University programmes have become more flexible, allowing applicants to choose subjects, forms of study and specialisations according to their individual interests and career preferences. This helped to create unique educational trajectories, taking into account the diverse talents and needs of the student community. Unfortunately, due to Russian full-scale invasion of Ukraine and the beginning of a new phase of the war, the higher education system, like other areas of life in the country, has undergone significant transformations. It is important to note that two years before, the education sector was operating in the context of the COVID-19 pandemic, which also led to significant challenges for higher education.

■ Open education as a space for communication and cooperation: Vectors of development

A number of strategic directions have been identified in the field of higher education in Ukraine that are important for its further development. In particular, important vectors are integration into the European and global educational space; improvement of the education

management system; ensuring the autonomy of higher education institutions, its openness and accessibility; development of professional growth of scientific and pedagogical staff; expansion of the system of continuous education and lifelong learning; introduction of new forms of education (distance, mixed, dual); digital transformation and introduction of innovative technologies in the educational process. The study examined these areas in more detail.

Adaptation of Ukrainian higher education to European and global standards, taking into account national peculiarities and interests. L. Smolinchuk (2023) noted that the outbreak of active hostilities on the territory of Ukraine has dramatically changed the circumstances related to foreign students. According to the Ukrainian State Centre for International Education, as of October 2022, 68,712 foreigners were studying in Ukraine, which is 16,000 fewer than before the war. A significant number of foreign students returned home or used the opportunity to obtain refugee status from Ukraine and equal rights with citizens of EU member states, including the right to study, and moved to neighbouring countries. The situation for Ukrainian students is also disappointing: according to available data, 665,000 students and schoolchildren (16% of the total) and 25,000 teachers (6% of the total) left the territory of Ukraine. However, Ukrainian students and teachers abroad act as ambassadors of their Ukrainian higher education institutions in foreign universities, which can lead to positive consequences for the internationalisation of Ukrainian universities.

Social media facilitate the integration of Ukrainian education into the global educational community, helping to share experience and knowledge with other countries. The use of social platforms allows to take into account national peculiarities while preserving cultural identity in the context of globalisation. M. Vasilieva (2024) believed that the internationalisation of education is the development of international aspects of learning through cooperation and exchange between educational institutions in different countries. This includes the exchange of students, teachers, researchers, double degree programmes and other initiatives to bring educational systems and cultures closer together. While internationalisation was often associated with student mobility, its forms are changing. The COVID-19 pandemic has made it difficult to admit international students in Ukraine, which has become a major challenge for many educational institutions. The war in Ukraine has further complicated the situation, but at the same time, the percentage of Ukrainian students who have gained experience of studying abroad has increased. According to Y. Zayachuk (2020), the international dimension of higher education has become increasingly complex, and the internationalisation of universities is a key aspect of global competition and strategic partnerships. It covers all levels, including global, continental, national, local, institutional and individual. A modern university must

improve its international ranking, develop academic mobility, create networks, conduct quality research and formulate a strategic action plan. The success of internationalisation depends on the right combination of actions and strategies that will affect its integration into the global education system.

I. Zabiya (2023) noted that initially, the process of internationalisation of education in the European educational area was limited mainly to academic mobility, which included the travel of students and teachers to study and train in other countries, as well as the exchange of ideas, etc. However, this process is recognised as having three key elements, namely the introduction of an international component into the content of curricula and programmes, the active involvement of students and teaching staff in international mobility, and the development and implementation of technical cooperation and mutual assistance programmes. This evolutionary development of the internationalisation of education in the European educational area indicates a deeper introduction of the international dimension into all areas of the educational process:

1. The inclusion of an international component in the content of curricula and programmes recognises the need to adapt the content of education to global challenges and realities. This allows students to gain a broader and more intercultural view of their education, broadens their horizons and prepares them for interaction in an international environment;

2. Active international mobility of students and faculty is a very important element of internationalisation. It stimulates the exchange of knowledge, cultural experience and skills, promotes mutual understanding and creates graduates who can work effectively in a global environment;

3. Technical cooperation and mutual assistance programmes help address common global challenges by facilitating the exchange of best practices and technologies. This contributes to improving the quality of education and research, and forms important international partnerships for universities.

Overall, the internationalisation of education not only broadens the horizons of participation in the educational process, but also creates an international community of knowledge and innovation that promotes sustainable development and global cooperation. T. Voropayeva *et al.* (2022) argued that the globalisation of education is a complex phenomenon that encompasses various processes, trends and patterns of development of educational systems at the global level. It is an irreversible and objective process that results from the socio-economic, political and cultural convergence of countries and peoples. The globalisation of education affects the formation of students' worldview, moral values and attitudes. It includes the integration of educational systems, promotes the interpenetration of cultures, the exchange of information and experience, as well as scientific and academic mobility.

As a result, the globalisation of education opens up opportunities for the introduction and assimilation of various pedagogical concepts and methods, which contributes to improving the quality and effectiveness of learning in an international context. Where globalisation is becoming an integral part of our existence, internationalisation is becoming a key trend that determines the development of university education in Ukraine. The internationalisation of university education in Ukraine not only improves the quality of education, but also creates graduates who are ready to meet the challenges of the global world and the development of modern society.

Improving the education management system and giving higher education institutions more autonomy. Social media support the transparency and efficiency of higher education institutions management. It allows institutions to communicate with the public, students and other stakeholders, which contributes to increased autonomy and responsibility for decision-making. I. Verboskyi *et al.* (2023) notes that according to the Law of Ukraine No. 1556-VII "On the Higher Education" (2014), the state provides financial support to higher education institutions (HEIs). Funding is determined by the principle of academic competition, which guarantees the allocation of funds to those institutions that have demonstrated high results in education and research. In addition, there is the right to provide additional educational services, which contributes to its financial sustainability. It is also important to note that the state encourages higher education institutions to interact with each other, with business, organisations and international structures. Joint activities facilitate the exchange of experience, innovative practices and improve the overall quality of education.

Such approach to financing higher education in Ukraine contributes to the creation of a competitive environment between universities. Academic competition helps to maintain high quality standards of education and research, as institutions that achieve exceptional results receive more funding. The ability of higher education institutions to provide additional educational services is an important incentive for their development and self-financing. This opens the door to the introduction of new methods, technologies and programmes that improve educational standards and make learning more attractive. By facilitating cooperation between higher education institutions, businesses, organisations and international institutions, the government promotes the exchange of innovative practices and experience. This leads to the creation of more adaptive and effective teaching methods, as well as the development of research and technologies that meet the needs of the labour market.

Ensuring openness and accessibility of higher education. Social communications contribute to increasing the accessibility of higher education through the dissemination of information, the creation of open educational resources and platforms for distance learning. This allows

for equal access to educational opportunities for a wide range of applicants, including those with limited access to traditional education.

S. Rybkina & E.T. Sokolova (2023) believed that the trend towards increased transparency and openness of higher education is relevant and in line with modern principles of good governance. This trend defines the need to ensure that information about curricula, the structure of higher education, the quality of education and other aspects of the activities of educational institutions is available to all stakeholders, from students to employers. This trend opens up opportunities to improve the interaction between universities and their environment, and contributes to a broader understanding and evaluation of educational processes. Providing easy access to information about education helps students make informed decisions about their studies and encourages universities to improve programmes and ensure high standards. As a result of this trend, higher education institutions are becoming more open to broad public discussion and evaluation. Interaction with stakeholders, such as employers, non-governmental organisations and students, allows for the consideration of diverse needs and views, contributes to the improvement of the quality of education and the formation of an open educational environment.

I. Kucherak (2020) argued that one of the key strategies for the development of higher education in Ukraine is to ensure accessibility. This goal is achieved through various measures, such as expanding the system of scholarships and other forms of financial support, developing opportunities for online and distance learning, expanding the number of available places in higher education institutions, etc. However, research shows that the equality of access to higher education is not the same in all regions of Ukraine. In some regions, there are greater opportunities for higher education, while in other regions the situation with accessibility remains problematic.

Ensuring the development of professional qualities and skills of academic staff. L. Verbovska (2022) analysed that higher education institutions face a number of challenges, as entering the global market of educational services requires not only the development of a competitive strategy and the creation of an appropriate environment, but also the acquisition of relevant knowledge and competencies of academic staff in assessing the international educational space. The use of social communications in education and professional development contributes to the development of pedagogical skills, adaptation to new teaching methods, exchange of experience with colleagues and introduction of innovative approaches to the educational process. F. Kurtiak et al. (2023) believed that the content of training of academic staff in the wartime period in Ukraine focuses on two main aspects: ensuring the functioning of higher education and ensuring the educational, methodological and research work of lecturers.

It is also important to develop promising educational and research strategies for further integration of Ukrainian higher education into the global educational space. A promising area of research in the practice-oriented training of academic staff is the use of innovative tools to maintain a balance between scientific, organisational and teaching and learning activities. This is defined as an important criterion of a lecturer's professional competences. New tools should provide equal access to the necessary scientific, organisational and educational resources for the process of acquiring professional skills. This allows lecturers to respond effectively to unforeseen circumstances in wartime.

Developing an education system that provides continuous lifelong learning opportunities. The flexibility of education is also linked to the development of the concept of "lifelong learning". Education no longer ends with a diploma is a constant process of adaptation to changes in society and the labour market. Universities must create conditions for graduates to be able to continuously update with new skills and knowledge throughout the life course. N. Ostanina (2023) identified several aspects of the term "lifelong learning": coverage of all educational activities of a person throughout the life, including basic, secondary, vocational education, as well as advanced training or retraining (in Ukraine it is defined as "lifelong education"); additional educational and upbringing activities of a person in the field of professional self-determination, self-development and career growth (in Ukraine it is considered as "adult education"); voluntary conscious educational activity of an individual aimed at satisfying personal interests and needs that goes beyond compulsory education (in Ukraine it is referred to as "non-formal education").

A. Anosova et al. (2022) believed that lifelong learning is important in the context of the Sustainable Development Goals. For its effective implementation, it is necessary to apply an approach that combines formal education with non-formal and informal learning, as well as andragogical, eutagogical and pedagogical methods. This contributes to the development and refinement of sensorimotor skills and the maintenance and restoration of long-term memory. M. Poplavskyi & I. Bondar (2021) noted that the concept of lifelong learning should include several key elements, including: self-education through information technologies such as computers, smartphones and online resources; individual mentoring and group counselling; education in professional, social, cultural and creative spheres and flexible forms of learning, including both synchronous and asynchronous classes, available at a convenient time for the participant. Social communications are a key tool to support lifelong learning, providing access to a variety of learning resources, self-education platforms and online communities that help develop new skills and competencies anytime, anywhere. In general, the "lifelong learning" approach recognises that educational needs and

requirements do not stop at a certain stage of a person's life, but are constantly changing and evolving along with social, economic and technological transformations. This approach is designed to take into account the dynamics of the modern world, which requires constant adaptation and acquisition of new knowledge to successfully integrate into various spheres of life.

After all, modern society is constantly improving, offering new challenges and opportunities. Accordingly, individual needs for knowledge, skills and competences are also changing. The concept of "lifelong learning" is designed to avoid the obsolescence of knowledge and skills, promoting continuous development, self-improvement and self-realisation. This approach encourages the search for new opportunities, active participation in educational programmes and courses that meet current and future needs. By providing access to various forms of learning, from traditional lectures to online courses, lifelong learning is becoming an important tool for success in a dynamic society.

Introducing new forms of education, such as dual, blended and distance learning. One of the key trends shaping the future of university education is the transition to flexible learning formats. Traditional lectures and seminars are gradually being replaced by online courses, webinars and other forms of distance learning. This allows students to determine their own pace and method of gaining knowledge, which suits their lifestyle and individual needs. The flexibility of learning also makes education more accessible, allowing students from all over the world to receive a high-quality education without being limited by geographical boundaries. Social media play an important role in supporting and developing new forms of education. They allow students to actively participate in the learning process regardless of their location and support flexible educational trajectories.

I. Kramarenko (2023) identified the following key areas of innovative development of the dual learning system under the influence of the fourth industrial revolution, such as the introduction of blended learning methods that combine formal and non-formal approaches; widespread use of data personalisation and the Internet of Things, including smartphones, tablets, and electronic communications; 24/7 education with the ability to access and study materials at any time; use of Artificial Intelligence in laboratory and practical classes; adaptability of educational programmes, which is achieved by improving it in accordance with the requirements of stakeholders and participants in the educational process; strengthening professional competences by increasing the practical component aimed at production. O. Kononenko *et al.* (2023) believed that one of the important trends in the development of higher education is the change in approaches to teaching and learning, in particular, the introduction of virtual learning. This method makes education more accessible, reduces its cost and increases the efficiency of the educational

process. However, in Ukraine, the use of virtual learning is not yet widespread enough and cannot completely replace traditional teaching methods.

Another important trend is the emphasis on practical skills and experience. The modern labour market requires graduates who not only have theoretical knowledge but can also apply it in real-life situations. Universities are improving their curricula by adding practical classes, internships, and projects with employers. This helps students gain practical experience and prepare for the challenges of the modern labour market. Z. Yurynets & I. Snovydyovych (2020) was noted that the traditional approach to education is gradually being replaced by new methods that focus on the concepts of "discovering", "acting" and "practicing". The emphasis is shifting from simply creating and absorbing knowledge to gaining practical experience through solving real-world problems. Flexible learning also means an individualised approach to each student. Instead of a general approach to the entire class, teachers become mentors who help each student develop their own educational path. Adaptive learning technologies allow us to create individual programmes, taking into account the needs and characteristics of each student.

L. Antoniuk *et al.* (2022) considered the advantage of individualised learning to be the ability to adapt to the psychological and physical characteristics of each person to achieve maximum effect from the learning process. However, the integration of individualised learning into traditional educational environments requires the teacher to carefully study and diagnose the personal characteristics of each student, which is a technically challenging task. Therefore, a key aspect of professional training is the creation of an individual zone of creative development for a future specialist, in particular through the introduction of adaptive learning systems. Y. Kropyvianskyi & O. Zvyagin (2024) argued that the diversity of students with the interests, needs and abilities they have requires more flexible and individualised approaches to learning. Individualisation helps to increase students' motivation, ensures more effective learning and the development of personal competences. This approach also opens up new opportunities for teachers, allowing them to create specialised programmes, use innovative methods and develop new pedagogical approaches. Thanks to individualised learning, students can maximise their potential, develop their interests and achieve both personal and academic success. This method is key to training competitive professionals capable of effectively solving complex problems in modern society.

Introduction of information technologies and digital innovations in education. Social media is an integral part of digital innovation in education. It enables the creation of new learning models by integrating technology into the educational process and promotes the development of digital competencies among students and lecturers. The introduction of information technologies and digital

innovations in education plays a key role in stimulating a creative approach to learning and developing critical thinking. This process determines not only the use of modern technologies in the educational process, but also the active formation of an interactive, dynamic environment for students. The use of information technology is necessary to create an atmosphere conducive to the development of innovative thinking in the university environment.

This means that students have the opportunity not only to receive information but also to actively interact with it, create their own content and explore new concepts. Thanks to digital innovations, the university is becoming a place where students can effectively use interactive platforms, electronic resources and online tools for self-study and creative development. This not only broadens students' horizons, but also helps to develop their critical thinking, analytical and problem-solving skills. The introduction of innovations in the educational process is becoming a catalyst for the development of universities. The use of modern technologies, virtual learning, gaming and other advanced teaching methods makes learning more attractive and effective. This allows universities to maintain a high standard of education quality and provide students with access to advanced knowledge.

Conclusions

The study identified key trends in the development of higher education in Ukraine. In particular, it was found that globalisation and internationalisation have become the driving forces of change. Ukrainian universities are actively integrating into the European and global educational space, adapting its programmes to international standards. These changes are reflected in both the structure of curricula and the methods of student assessment, which ensures more relevant and up-to-date learning. Integration into the European and global educational space, taking into account national interests, creates an opportunity for Ukrainian universities to actively cooperate with international institutions, share best practices and implement advanced teaching methods. In parallel, the study analysed the transition from traditional learning models to more flexible formats. The study revealed the growing role of distance learning, blended learning and individual learning paths. The emphasis is increasingly shifting to the development of practical skills of

students, which allows them to adapt more quickly to the requirements of the labour market. This has made it possible to determine that flexible learning formats are becoming an important element in the development of modern educational programmes.

An important role in the study was played by analysing the impact of information technology on the educational process. It was found that digital tools contribute to improving the efficiency of learning and developing students' digital competencies. This study highlights how the latest technologies can be integrated into the educational process to improve the quality of education and provide more accessible and convenient learning. The study of the concept of lifelong learning has shown that the understanding of education as a continuous process is becoming increasingly important. This points to the need to implement programmes that ensure continuous professional development. Among the challenges faced by Ukrainian higher education, insufficient funding, the need to upgrade the qualifications of teaching staff and the need to update the material and technical base of universities were highlighted. This study highlights the key obstacles to improving the quality of education and provides recommendations on how to overcome them.

The findings of the study showed that Ukrainian higher education is in an active phase of development. However, to successfully adapt to new challenges, additional measures need to be taken, such as increasing investment in education, supporting innovative projects, and developing international cooperation. This will ensure a high level of quality education and prepare students for the requirements of the modern world. Further research includes a more detailed analysis of the effectiveness of various flexible learning models, an assessment of the impact of digital technologies on the quality of education, and a study of labour market needs and the relevance of educational programmes to these needs. This will allow us to gain a deeper understanding of the changes taking place in the education sector and develop strategies for further development.

Acknowledgements

None.

Conflict of Interest

None.

References

- [1] Ajaja, M., & Ostenda, A. (2022). Theoretical foundations of internationalization of higher education. *Scientific Notes of Berdiansk State Pedagogical University. Pedagogical Sciences*, 2, 11-27. [doi: 10.31494/2412-9208-2022-1-2-11-27](https://doi.org/10.31494/2412-9208-2022-1-2-11-27).
- [2] Anosova, A., Horpynchenko, O., Bulavina, O., Shevchuk, H., & Valentieva, T. (2022). The use of active learning methods for lifelong education. *Journal for Educators, Teachers and Trainers*, 13(3), 260-273. [doi: 10.47750/jett.2022.13.03.025](https://doi.org/10.47750/jett.2022.13.03.025).
- [3] Antoniuk, L., Soia, O., Kosovets, O., Klimishyna, A., Kovtoniuk, M., & Tryfonova, O. (2022). Ensuring the innovativeness of vocational education: Neuropedagogical aspect. *BRAIN. Broad Research in Artificial Intelligence and Neuroscience*, 13(4), 242-263. [doi: 10.18662/brain/13.4/386](https://doi.org/10.18662/brain/13.4/386).

- [4] Debych, M., Polishchuk, O., Iehupov, M., Levkulych, V., Palamarchuk, O., & Drach, I. (2023). Internationalization of higher education and scientific research as a stage in the development of intelligent information systems. *AIP Conference Proceedings*, 2812(1), article number 020102. doi: [10.1063/5.0161320](https://doi.org/10.1063/5.0161320).
- [5] Kononenko, O., Gudimova, A., & Kurova, A. (2023). Modern trends and strategies for the development of higher education in Ukraine: Analysis of implementation. *Perspectives and Innovations of Science*, 9(27), 232-244. doi: [10.52058/2786-4952-2023-9\(27\)-232-244](https://doi.org/10.52058/2786-4952-2023-9(27)-232-244).
- [6] Kramarenko, I. (2023). Innovative vectors of development of the dual form of professional competence acquisition under the influence of the IV industrial revolution. *Digital Economy and Economic Security*, 8(8), 3-7. doi: [10.32782/dees.8-1](https://doi.org/10.32782/dees.8-1).
- [7] Kropyvianskyi, Y.O., & Zvyagin, O.S. (2024). [Individualization in the educational process of higher education institutions](#). In *Materials of the LII scientific and technical conference*. Vinnytsia: VNTU.
- [8] Kucherak, I.V. (2020). Digitalization and its impact on the educational space in the context of key competencies formation. *Innovative Pedagogy*, 2(22), 91-94. doi: [10.32843/2663-6085/2020/22-2.20](https://doi.org/10.32843/2663-6085/2020/22-2.20).
- [9] Kurtiak, F.F., Vakerich, M.M., & Beseganych, I.V. (2023). [The content of training of scientific and pedagogical workers of higher education institutions in the conditions of military realities \(Ukrainian experience\)](#). *Academic Visions*, 15.
- [10] Law of Ukraine No. 1556-VII "On Higher Education". (2014, July). Retrieved from <https://zakon.rada.gov.ua/laws/show/1556-18#Text>.
- [11] Lugovyi, V., Kalashnikova, S., Talanova, Z., & Vlasova, I. (2023). Transformation of higher education in Ukraine: Impact of the war and objectives for post-war recovery. *European Journal of Education*, 58(4), 611-628. doi: [10.1111/ejed.12584](https://doi.org/10.1111/ejed.12584).
- [12] Orzhel, O., Trofymenko, M., Porkuian, O., Drach, I., Halhash, R., & Stoyka, A. (2023). Displaced universities in Ukraine: Challenges and optimal development models. *European Journal of Education*, 58(4), 629-646. doi: [10.1111/ejed.12581](https://doi.org/10.1111/ejed.12581).
- [13] Ostanina, N.S. (2023). Continuing education as a factor of professional development. *Actual Problems in the System of Education: General Education Institution of Secondary Education – Pre-University Training – Higher Education Institution*, 1(3), 494-502. doi: [10.18372/2786-5487.1.17733](https://doi.org/10.18372/2786-5487.1.17733).
- [14] Ponomarenko, N., Polyansky, P., Shkurat, I., Romanenko, M., & Tolochko, S. (2022). Quality management of higher education for increasing the competitiveness of labour resources. *International Journal for Quality Research*, 16(3), 817-830. doi: [10.24874/ijqr16.03-11](https://doi.org/10.24874/ijqr16.03-11).
- [15] Poplavskyi, M., & Bondar, I. (2021). Application of information technologies for lifelong learning. *International Journal of Computer Science and Network Security*, 21(6), 304-311. doi: [10.22937/IJCSNS.2021.21.6.39](https://doi.org/10.22937/IJCSNS.2021.21.6.39).
- [16] Rybkina, S.O., & Sokolova, E.T. (2023). [The main managerial challenges in reforming the system of higher education of Ukraine. Modern aspects of modernization of science: State, problems, development trends](#). In *Materials of the XXXI international scientific and practical conference* (pp. 61-65). Rome: NGO "VADND".
- [17] Sibrak, A.V., Lytvynska, S.V., Koshetar, U.P., Senchylo-Tatlilioglu, N.O., Stetsyk, C.M., Diachuk, T.M., & Sibrak, V.L. (2023). Ukrainian education system: War challenges. *Multidisciplinary Science Journal*, 5, article number e2023ss0502. doi: [10.31893/multiscience.2023ss0502](https://doi.org/10.31893/multiscience.2023ss0502).
- [18] Smolinchuk, L.S. (2023). [Internationalization of higher education: Challenges and new opportunities](#). In *Actual problems of higher professional education* (pp. 130-134). Kyiv: National Aviation University.
- [19] Vasilieva, M. (2024). Internationalization of higher education institutions of Ukraine: Challenges and prospects for implementation. In *Development of a single open information space for lifelong learning: Collection of materials (scientific papers, abstracts) of the 6th international scientific and practical WEB-forum* (pp. 120-135). Vinnytsia: Nilan LTD. doi: [10.33407/lib.NAES.740977](https://doi.org/10.33407/lib.NAES.740977).
- [20] Verbovska, L. (2022). Strategic flexibility of higher education institutions in the formation of competitive goals in the face of change. *Herald of Khmelnytsky National University*, 2(6), 178-183. doi: [10.31891/2307-5740-2022-312-6\(2\)-30](https://doi.org/10.31891/2307-5740-2022-312-6(2)-30).
- [21] Verbovskyi, I.A., Kit, N.V., & Spolska, O.V. (2023). Mechanisms and principles of management of the higher education system in Ukraine. *Herald of Science and Education*, 13, 428-439. doi: [10.52058/2786-6165-2023-7\(13\)-428-439](https://doi.org/10.52058/2786-6165-2023-7(13)-428-439).
- [22] Voropayeva, T., Kuzmenko, R., Iuksek, G., Stepanenko, O., & Kobal, V. (2022). Educational and scientific potential of the XXI century. Challenges and prospects. *Eduweb*, 16(2), 95-106. doi: [10.46502/issn.1856-7576/2022.16.02.6](https://doi.org/10.46502/issn.1856-7576/2022.16.02.6).
- [23] Vyshkivska, V.B., Kondratenko, L.I., Patlaichuk, O.V., & Malinka, O.O. (2022). Student-centred learning as a factor in improving the system of professional training in higher education institutions. *Scientific Bulletin of the National Pedagogical Drahomanov University*, 87, 20-24. doi: [10.31392/NPU-nc.series5.2022.87.04](https://doi.org/10.31392/NPU-nc.series5.2022.87.04).
- [24] Yurynets, Z.V., & Snovydyovych, I.H. (2020). Competency-based approach in the field of higher education in Ukraine. *Strategy of Economic Development of Ukraine*, 46, 201-212. doi: [10.33111/sedu.2020.46.201.212](https://doi.org/10.33111/sedu.2020.46.201.212).

- [25] Zabiya, I. (2023). The problem of internationalization of the modern European educational space. *Scientific Collection "InterConf+",* 33(155), 148-153. doi: [10.51582/interconf.19-20.05.2023.014](https://doi.org/10.51582/interconf.19-20.05.2023.014).
- [26] Zayachuk, Y. (2020). Internationalization as a component of the university's activities and its role in the modern dynamics of higher education. *Ukrainian Pedagogical Journal,* 4, 34-44. doi: [10.32405/2411-1317-2020-4-34-44](https://doi.org/10.32405/2411-1317-2020-4-34-44).

Соціальні комунікації як фактор диверсифікації траєкторій гнучкого навчання

Оксана Плужник

Доктор філософії, доцент
Університет Григорія Сковороди в Переяславі,
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0000-0001-8780-8288>

Олена Хмельницька

Кандидат педагогічних наук, доцент
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0000-0002-0644-6201>

Лариса Ткаченко

Кандидат філологічних наук, доцент
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0000-0001-6972-6350>

Яна Зленко

Викладач
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0009-0001-6052-7897>

Анотація. Сучасна освітня парадигма вимагає розглядати навчання як динамічний і гнучкий процес, а не просто передачу інформації. Зростаюча складність суспільства та швидкі зміни в технологічній та інформаційній сферах потребують нових підходів до навчання, які б сприяли розвитку критичного мислення, творчості та адаптивних навичок. У цьому контексті, розуміння ролі соціальних комунікацій у формуванні гнучких освітніх траєкторій стає ключовим завданням для освітян. Мета дослідження полягала в аналізі актуальних викликів та тенденцій, що визначають розвиток вищої освіти в Україні. Дослідження було спрямоване на розуміння механізмів впливу соціальних комунікацій на гнучкість навчання, враховуючи вплив глобалізації, технологічних інновацій та інших сучасних векторів. Результати дослідження вказують на те, як соціальні комунікації впливають на формування гнучких навчальних траєкторій, виявляючи ефективні моделі їх використання, проблеми і бар'єри. У статті розглянуто широкий спектр актуальних викликів та еволюційних змін, що визначають майбутні перспективи розвитку системи вищої освіти в Україні. В основі аналізу лежить розгляд гнучкості навчання, яка стає ключовим аспектом в умовах глобальних трансформацій, стрімкого розвитку технологічних інновацій та постійних змін на ринку праці. Особлива увага приділена стратегіям інтернаціоналізації, виокремлюючи їх вплив на вищу освіту в умовах глобалізації. В статті розглянуто сучасні форми освіти, проаналізовано їх значущість для забезпечення якісного та сучасного навчання, спрямованого у відповідь на виклики інформаційного суспільства. Розглянуто систему безперервної освіти як ключового елементу, спроможного забезпечити здобувачів постійною актуалізацією їхніх знань та компетентностей протягом усього життя. Окремо розглянуто новітні підходи до освіти, включаючи використання технологій для оптимізації освітнього процесу та розвитку ключових навичок здобувачів. Особливий аспект аналізу становлять питання інновацій в освітньому процесі та розвитку компетентностей здобувачів, враховуючи різноманіття їхніх потреб та вимоги сучасного суспільства. Дане дослідження може допомогти у визначенні майбутніх тенденцій та інновацій у сфері освіти. Практичне значення дослідження полягає в розробці ефективних стратегій для інтеграції соціальних комунікацій у навчальний процес, що сприяє гнучкості навчання та адаптації освітніх програм до потреб здобувачів. Результати можуть бути використані для вдосконалення методик викладання, поліпшення взаємодії між учасниками освітнього процесу та впровадження інноваційних підходів, що допоможуть краще відповідати сучасним вимогам і тенденціям у сфері освіти.

Ключові слова: соціальна взаємодія; глобалізація; неперервний професійний розвиток; освітні технології; інформаційні технології; цифрові інновації



Society. Document. Communication

Journal homepage: <https://sdc-journal.com.ua/en>
Society. Document. Communication, Vol. 9, No. 2, 71-79

Article's History: Received: 24.01.2024 Revised: 05.04.2024 Accepted: 28.06.2024

UDC 655.4/5(477)

DOI: 10.69587/sdc/2.2024.71

Supporting Ukrainian book publishing in the context of modern socio-cultural challenges

Sergii Ulko*

Postgraduate Student

Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
<https://orcid.org/0009-0008-9575-8370>

Abstract. The relevance of the work is to preserve Ukrainian cultural heritage by supporting book publishing in the context of globalisation, economic difficulties and digital transformation. The purpose of the study was to comprehensively analyse the state and key problems of the industry and outline the prospects for supporting Ukrainian book publishing in the face of current challenges to ensure its competitiveness in both the domestic and international markets. The study used the methods of analysis, systematisation, and generalisation. The results of the study indicated the need to develop effective strategies to support Ukrainian book publishing in the face of current challenges, in particular through adaptation to changing market conditions. This article discussed the importance of the book as the main carrier of culture and its multifaceted role in society. In particular, the economic difficulties faced by publishers, including financial constraints and problems with access to resources, are discussed. An important role is played by the impact of globalisation, which not only opens up new opportunities for the integration of Ukrainian books into the international context, but also creates competition from foreign publications. The author traced legislative initiatives aimed at stimulating the development of Ukrainian book publishing and book distribution. In particular, the measures taken to improve the working conditions of publishers, expand the book market, increase the number of bookstores and book circulation are considered. However, despite these initiatives, there are problems that need to be further addressed to ensure the sustainable development of the industry. The article examined the impact of digital transformation on book publishing, including the processes of creating, producing and distributing books. Digital technologies are significantly changing traditional book publishing systems, opening up new opportunities for access to literature and innovative formats for presenting books. The article recommends strategies for supporting and developing book publishing in the context of modern challenges and changes. The practical significance is to outline the main strategies for supporting and developing Ukrainian book publishing, which can help publishers, authors and booksellers to effectively adapt to current challenges and market conditions

Keywords: publishing industry; book publishing history; book publishing digitalisation; book distribution; cultural heritage; competitiveness; publishing strategy

Introduction

Book publishing plays an important role in the cultural and intellectual development of a society, shaping public consciousness and preserving national traditions. In Ukraine, where the literary heritage has deep roots and is

Suggested Citation:

Ulko, S. (2024). Supporting Ukrainian book publishing in the context of modern socio-cultural challenges. *Society. Document. Communication*, 9(2), 71-79. doi: 10.69587/sdc/2.2024.71.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author

essential to the national identity, supporting book publishing is not just a task but a strategic challenge. In the context of globalisation and the rapid development of digital technologies, Ukrainian book publishing faces numerous challenges, including economic pressures, competition with international markets and changes in consumer preferences.

The current realities impose new requirements on Ukrainian book publishing in terms of adaptation to digital formats, changes in reader behaviour, and the need to preserve cultural identity. In this context, it is important to consider not only the challenges faced by the industry, but also the opportunities that are opening up for its development. Supporting and developing Ukrainian book publishing is an important aspect of the national cultural policy, which contributes to the preservation and expansion of cultural heritage and ensures access to knowledge and literature for all segments of the population.

After examining various studies conducted by both Ukrainian and international scholars, several key aspects were identified that determine the current state and prospects of book publishing in Ukraine. This enables a better understanding of the main trends and challenges faced by the industry, as well as identifying important areas for further development and research.

V. Shpak (2024) rightly notes that the publishing industry has a dual task, on the one hand, it should provide financial revenues to the state budget, create jobs and meet the social needs of citizens. On the other hand, it plays an important role in meeting the spiritual, cultural and informational needs of society. O.V. Trishchuk & V.S. Kiryak (2023) conclude that the current problems of the development of Ukrainian book publishing in the context of transformation indicate the need to adapt to new challenges. Among the main difficulties faced by the publishing industry in Ukraine is the need to improve existing forms of activity, increase the sustainability and efficiency of processes, and develop new approaches to the production and distribution of books. Publishers are required to introduce innovations in the organisation of processes, improve logistics and adapt to international standards.

The problems of modern book publishing, according to researchers A.R. Novachuk & N.I. Ivanova (2019) include: a disorganised book distribution structure; lack of effective support for the national book market; imperfect state and legal regulation of the book publishing sector; lack of a clear strategy for the development of book publishing; insufficient monitoring of the thematic, economic and financial state of the book market of Ukraine; technical and technological obsolescence of printing enterprises; weak information and advertising support for the book market; insufficient quality of content of Ukrainian books; low level of development of scientific book publishing; and underdevelopment of electronic book publishing. These problems not only hinder the development of Ukrainian book publishing, but also have a negative impact on the cultural and educational level of society, creating obstacles to access to quality and diverse literature.

A. Semenyuk & I. Bagmut (2024) believe that one of the problems of Ukrainian book publishing is a small readership compared to other countries. For this reason, book marketing in Ukraine is often limited to promotion through social media, organising events (exhibitions, presentations) and engaging bloggers. Moreover, very few authors are interested in promoting their books. V. Sytnyk (2023) rightly notes that large losses due to emigration and economic difficulties force publishers to adapt and implement innovative strategies. One of these is the development of digital publishing, which demonstrated its importance at the beginning of the full-scale invasion, when many Ukrainian publishers and digital bookstores, responding to public demand, provided free access to e-books on their platforms.

Another innovative strategy is eco-trends. As N. Romaniuk (2022) notes that eco-trends in Ukrainian book publishing are manifested in several ways. The design aspect includes the use of colours and elements associated with purity and nature, as well as printing on FSC-certified paper or paper made from recycled materials. In terms of content, the number of books on environmental topics in the portfolios of Ukrainian publishers is growing, covering different target audiences. Marketing trends include the use of responsible consumption, forest and water protection, and climate change in advertising. Organisationally, elements of a "green office" are being introduced, and in the post-marketing aspect, practices such as bookcrossing and other ways of reusing books are being popularised.

Purpose of the study was to comprehensively examine the current state of Ukrainian book publishing, identify the main problems facing the industry, and develop ways to support its development in the face of modern challenges. Objectives of the study were to analyse the current state of Ukrainian book publishing and outline the main strategies for adapting and improving the competitiveness of book publishing.

To achieve the purpose, a number of scientific methods were used. The method of analysing scientific literature made it possible to trace the evolution of book publishing from traditional printed publications to modern electronic formats. Particular attention was paid to analysing the impact of digital technologies on all stages of the publishing process: from layout creation to distribution of finished products. The method of data systematisation made it possible to classify various technological tools used in book publishing and assess their potential. The generalisation method allowed to formulate the main trends in the industry and identify the key factors that influence the success of publishing projects in the context of digital transformation.

▀ Problems of Ukrainian book publishing in the context of globalisation and digitalisation

Book publishing is the basis for preserving and transmitting national cultural heritage, which is key to preserving national traditions, language and literary heritage. In the context of globalisation and digitalisation, when cultural identities

can be threatened, supporting Ukrainian book publishing becomes an important task. Economic challenges such as declining circulation, rising paper and printing costs, and competition with international publishers require exploring opportunities to improve the financial sustainability of Ukrainian publishing houses and support local authors.

M. Magadán-Díaz & J.I. Rivas-García (2022) note that there has been a growing interest in the publishing industry as a research subject, which is manifested in the increasing number of publications on this topic. The publishing industry actively contributes to economic development in various countries. According to the latest report by the World Intellectual Property Organisation (WIPO), revenue from publishing exceeded USD 64.4 billion in 2020. The largest net income in this area in 2020 was received by the United States (\$23.6 billion) and Japan (\$10.8 billion). The countries with the highest number of titles published during the year include the UK (186,000), Italy (125,548) and France (97,327) (World Intellectual Property Organisation, 2020). These data underline the importance of publishing and its significant changes in the last two decades due to new media, formats and digital business models, which creates new challenges for the industry. The growth of academic literature on the publishing industry allows for a better understanding of the impact and evolution of the various phenomena shaping the publishing business in each country.

U. Blattmann *et al.* (2020) point out that scholarly communication is a key element in the development of science, the publishing industry and society, but for this it is important that quality content is available in the open access, especially in countries with limited resources for education and research. M. Gandy (2023), exploring the potential quality issues of open access books compared to those published by established academic publishers, notes that the lack of full coverage of book production costs may lead to less rigorous editing and review than in the case of publishers that use expensive evaluation and editing processes.

A. Radchenko (2023) in the study evaluated the contribution of two general scientific book projects of the National Academy of Sciences of Ukraine, "Scientific Book" and "Scientific Book. Young Scientists" to the replenishment of state libraries' collections. She analysed the main quantitative indicators of these projects: the first has existed since 2001, and the second, established in 2009, supports young scientists by providing them with priority opportunities to publish scientific results. Since both projects are funded from the budget, the published books are distributed free of charge by order of the Presidium of the National Academy of Sciences of Ukraine, which contributes to the enrichment of the collections of scientific libraries, higher education institutions, and research institutions over 20 years, 595 titles have been published with a total circulation of 169.1 thousand copies, of which 19.55% were received by the Vernadsky National Library of Ukraine, the Lviv National Scientific Library of Ukraine, higher educational institutions, and other research institutions. The

conclusions indicate that the systematic publishing activities of the NAS of Ukraine over the past 20 years have successfully contributed to the replenishment of libraries with high-quality Ukrainian scientific literature.

■ State support for book publishing in Ukraine of successes, problems and prospects

Ukraine makes significant contributions to the development of book publishing. On 19 June 2022, the Verkhovna Rada of Ukraine adopted Law of Ukraine No. 2313-IX (2022) in the second reading, which entered into force on 10 July 2022. This draft law was registered by Members of Parliament in November 2021, before the start of the large-scale invasion. The initiative was supported by 64 Members of Parliament. The adoption of the law was widely supported by the book community, teachers, scholars and literature enthusiasts. The publishers hoped that state support in such a difficult and crucial time would not only help preserve the industry, but also promote its development, which plays an important role in educating future generations (Draft Law of Ukraine No. 6287, 2021).

The explanatory note to the draft law states that the purpose of the draft law is to stimulate the development of the Ukrainian book market, which is an important factor in humanitarian development and national security. The draft law provides for mechanisms that can help to expand the network of bookstores, increase the circulation and range of books, and promote reading in the Ukrainian language throughout the country, significantly reducing the destructive impact of the aggressor state on the Ukrainian book market. Currently, with a population of over 40 million, there are only about 200 bookstores left in Ukraine (for comparison, in 1991 there were 3,600, and in France, which is comparable to Ukraine in terms of population and territory, there are about 3,300 bookstores). It was expected that the adoption of the bill would be a powerful stimulus for the development of the Ukrainian book market. Within five years, the number of bookstores would increase by at least 4-5 times, reaching 800-1,000, with bookstores appearing even in small towns, covering the whole of Ukraine. The volume of the Ukrainian book market would grow by about three times, and the range of books would double. At the same time, the share of people who buy and read books primarily in Ukrainian would increase significantly, both due to new readers and those who currently read primarily in Russian (Draft Law of Ukraine No. 6287, 2021).

Each thesis of the explanatory note is worth agreeing with, as it clearly emphasises the importance of state support for book publishing. However, a year and a half has passed since the adoption of the relevant law, and despite positive expectations, the situation in the industry remains difficult. Book publishers, writers, and members of the book community are increasingly expressing concerns about the existing problems and lack of support from the state. These issues not only limit the opportunities for the development of book publishing, but also impede the full functioning of the industry, which could make a significant contribution to

the cultural and educational development of society. Without effective support and adequate measures to improve the situation, book publishing will not be able to realise its potential and ensure sustainable development, which is critical for preserving cultural heritage and fostering new generations of readers.

On its official website, the Ukrainian Book Institute (UBI) (The official position of the Ukrainian Book Institute on granting certificates and subsidies, 2023) published an explanation of the impossibility of implementing the provisions of the laws on stimulating the development of Ukrainian book publishing and distribution. The report states that the UBI is actively working to support book publishing, and it was thanks to its initiative that in 2020 an article on granting certificates for the purchase of books was introduced into the law, which later became the basis for the E-support mechanism. The law envisaged the launch of a programme to provide Ukrainians with certificates for the purchase of books from 1 January 2023 and the launch of a subsidy programme for bookstores in April 2023. However, due to the war, the budget for this year did not provide funds for the implementation of these programmes. The government plans to consider implementing these programmes after the end or cancellation of martial law in Ukraine.

This publication caused a significant response and outrage among the public. The very next day, on 12 January 2023, a well-known Ukrainian writer Oksana Zabuzhko published a post on her Facebook page titled "Failure to comply with laws supporting Ukrainian books is a threat to national security". In the post, Zabuzhko stressed that Ukraine's war against the Russian occupiers is primarily a struggle for identity, and that the protection of the Ukrainian cultural space and support for national cultural industries is an extremely important front in this war. The author expressed her disagreement with the official position of the Ukrainian Book Institute regarding Law of Ukraine No. 2313-IX (2022), which provides for the provision of book certificates for children and subsidies for Ukrainian bookstores. Zabuzhko stressed that despite the difficult conditions of war, new bookstores continue to open in Ukraine and new books are being published. The author noted that the destruction of trust in the state through the failure to implement important laws is unacceptable, especially when it comes to laws aimed at protecting the cultural and information space from the influence of the Russian world. According to the speaker, the failure to implement these laws is a direct threat to Ukraine's national security, as Ukrainian books are also a weapon in the war for our culture and statehood.

This publication was signed by a number of prominent people, writers, publishers, and artists, including Yuriy Vynnychuk, Irma Vitovska, Tamara Horikha Zernia, Hanna Hopko, Vasyl Dobrianskyi, Andrii Kokotiukha, Iren Rozdobudko, Tetiana Stus, and many others. It is impossible to disagree with the above, because the expenditures in the amount of 0.02% of the country's budget are not so large that it would allow making the provisions of the Law "dead" and neglecting them almost immediately after its adoption.

In 2021, Ukraine created the "eSupport" programme to support citizens who have received the Covid-19 vaccination. The aim of the programme was to encourage vaccination by providing state aid in the form of funds that can be spent on various needs, including the purchase of books and other goods and services.

L. Shenderivska *et al.* (2022) note that the "eSupport" programme allowed citizens who received state funds to spend them for various purposes, including the purchase of publishing products (after the Russian military invasion of Ukraine, these restrictions were lifted). According to the Ukrainian national news agency "Ukrinform", as of 11 February 2022, the largest share of "eSupport" funds – UAH 987 million, or 35% – was spent on the purchase of book products. This demonstrates that the "eSupport" programme contributes to the long-term growth of the publishing industry. Reading the purchased books forms and reinforces the habit of reading, so the effect of the programme will be long-lasting. To increase the effectiveness of the programme, some publishers offer book bundles to consumers.

O.V. Trishchuk & V.S. Kiryak (2023) agree that the "eSupport" programme not only promotes the development of the publishing sector, but also provides critical support in wartime, starting from 24 February 2022, when the territory of Ukraine became the scene of a full-scale invasion. The authors note that rocket attacks and shelling have affected publishing enterprises, including bookstores, which has complicated their operations and forced them to evacuate. These difficulties have had a significant impact on the publishing industry in Ukraine.

On 25 June 2023, Law of Ukraine No. 2309-IX (2022) came into force. This Law supplemented the Law of Ukraine "On Publishing Industry" with a new Article 28-1, which regulates the import and distribution of publishing products related to the aggressor state, the Republic of Belarus or the temporarily occupied territories of Ukraine. According to this provision, it is prohibited to import into the customs territory of Ukraine and/or distribute on its territory publishing products originating from, manufactured or published in the territory of the aggressor state, the Republic of Belarus or the temporarily occupied territories of Ukraine (except for products issued before the temporary occupation). The ban also applies to book publications containing works by authors who were citizens of the aggressor state after 1991, except for those who are or were citizens of Ukraine and do not have the citizenship of the aggressor state. Publishing products issued in the language of the aggressor state that do not fall under these restrictions may be imported and distributed in Ukraine with the appropriate permit (Draft Law of Ukraine No. 6287, 2021).

It should be noted that this Law also introduced liability for the distribution in Ukraine of publishing products originating or produced, issued or imported from the territory of the aggressor state, the Republic of Belarus, the temporarily occupied territories of Ukraine, as well as those included in the Register of Anti-Ukrainian Publishing Products

(Yatskiv *et al.*, 2023). This also applies to the distribution of publishing products issued in the official language of the aggressor state without proper permission. Such violations are subject to administrative and economic sanctions in the form of fines: two minimum wages for each first case of distribution, and ten minimum wages for each subsequent case. Thus, for the first violation, the distributor must pay a fine of UAH 16,000, and for a repeated violation – UAH 160,000. At the same time, the Law does not limit the repeated violations to a certain timeframe.

However, R. Holubovskyi (2024), on the contrary, sees positive trends in this and argues that the Ukrainian book market is showing positive dynamics at the beginning of 2024. Due to the rejection of Russian culture and new legislative initiatives, Russian books have virtually disappeared from the market. Demand for Ukrainian literature, both classic and contemporary, is growing. Publishers are launching series of Ukrainian classics and new debut authors. Internationally, there is interest in Ukrainian stories and authors, but there is a lack of professional translators. New bookstores are opening, and some of them are setting records for the number of titles they sell. Ebook and audiobook formats are developing rapidly. In addition, book bloggers and reading clubs are developing.

A. Berendieiev (2023) emphasises that both adopted draft laws have significant potential to become powerful tools for stimulating and developing the Ukrainian book market and the industry as a whole, which is important for humanitarian development and national security. The proposed innovations could not only support the publishing industry, but also become an impetus for the development of culture and the promotion of reading books in Ukrainian among citizens. However, for a number of reasons, these provisions were not implemented, with one of the drafts not being signed by the President and therefore not entering into force, and the other remaining unimplemented due to lack of funding (when Ukraine's budget for 2023 was prepared under martial law, no funds were provided for the implementation of the law).

Effective strategies for overcoming modern challenges in book publishing

Y. Safonov *et al.* (2023), studying trends in book publishing in countries with a high level of education and developed publishing of educational literature and analysing the problem of controlling budget expenditures on the printing of textbooks and manuals in Ukraine, found insufficient efficiency of the modern system of publishing educational literature and the need to update the standardisation of costs and material waste.

The study results of D. Ren and Z. Kang (2021) clearly demonstrate the profound transformations caused by the COVID-19 pandemic in the publishing industry. The decline in the number of new publications and significant financial losses of bookstores indicate the vulnerability of traditional business models. The shift of marketing and sales to the online space indicates the need for the industry to adapt to

new digital realities. The study highlights the importance of a quick response to challenges and readiness for technological changes that will determine the future of the publishing market in the crisis and post-pandemic recovery.

The study results of J.-A. Cordon-García & M. Muñoz-Rico (2022) clearly show that the digital revolution has fundamentally changed all aspects of books, from its creation and production to distribution and consumption. The integration of electronic devices has transformed traditional systems, opening up new opportunities and challenges for the industry. In turn, D.M. Frohlich *et al.* (2024) emphasise the potential of combining physical and digital information through augmented reality, but note that the commercial application of these technologies for printed books is not yet widespread and is mainly limited to QR codes and special AR applications. This highlights the need for further development and integration of innovative technologies to expand its impact on the book publishing industry.

The study results of A. Esteve (2024) emphasise an important aspect of the transition to digital publishing, namely the intensification of the debate around copyright. The author correctly notes that the open access movement is not opposed to copyright protection, but rather criticises the use of these rights to serve the interests of publishers, often to the detriment of authors. This points to the need for a balance between the protection of intellectual property rights and access to information. Instead, the study by C.D. Miller & R.D. Wang (2024) shows that e-books reduce printing and shipping costs, making them more cost-effective than print editions. This confirms the economic advantage of digital formats in today's publishing environment and its role in reducing costs for publishers.

O. Holovko (2022) notes that the main challenges faced by book publishing are the following, the lack of competitive publications in the Ukrainian book market related to design; high cost and limited availability of existing publications for a wide audience; narrow specialisation of the existing books, which does not allow to form a complete and versatile picture of design activity; inconsistency of the content of existing publications with the requirements for training and professional development of design professionals; inadequate selection and distribution of graphic and textual material, difficulties with the choice of software for book layout, non-compliance with the requirements for illustrative design, both print and digital; as well as didactic and methodological imperfection of publications. It is clear that these problems limit the availability of quality literature for designers, which in turn delays the development of their professional skills, reduces the level of innovation in design and creates barriers to improving the quality of design solutions on the market.

O. Afonin (2020) believes that a number of solutions need to be implemented to eliminate the problems that currently hinder the development of Ukrainian book publishing. First, both short-term and long-term strategies for the development of the publishing industry should be developed. Every year, libraries should update the collections

by 5% of the number of books available at the beginning of the year, in line with the standards of the International Association of Librarians. It is also important to simplify the procedures for purchasing literature for libraries by cancelling tender procedures. Funding for literature purchases should come from both the state and local budgets. To improve access of Ukrainian scholars to the world's scientific literature, grant programmes for translations should be introduced. Finally, it is necessary to restore the book trade system, providing the population with stationary bookstores in accordance with established standards.

A similar opinion is shared by N. Zubko & O. Stadnyk (2021), who believe that the development of the publishing sector as a key element of book communications is possible only through comprehensive research of the book market, active promotion of books and reading in society, improving the quality and competitiveness of publications, state support for socially important projects, creating effective credit and taxation systems, as well as optimising existing and introducing new educational programmes, including interdisciplinary ones.

The study by S. Buryak (2021) highlights the importance of a systematic approach to supporting the publishing industry through government initiatives. The author rightly notes that the introduction of concessional lending and the attraction of investments from other business sectors can significantly improve the financial conditions for industry participants. However, to achieve a real effect, these measures should be clearly enshrined in legislation. This points to the need for comprehensive and well-planned government policies that can contribute to the sustainable development of the publishing industry and create a favourable environment for its investment attractiveness.

The results of the study by C. Parnell & B. Driscoll (2023) emphasise the importance of comprehensive collaboration between authors, publishers, digital platforms and other stakeholders to create bestsellers. The authors rightly emphasise that the understanding of the mechanisms of bestseller success is dynamic and still evolving in a changing media landscape, which points to the need for flexible strategies and adaptation to new market conditions to effectively harness the potential of all stakeholders in the publishing process and ensure the success of books in today's digital environment.

The findings of the study by M. Weber *et al.* (2023) highlight the important role of book publicists in attracting media attention to new books and distributing it to readers. The authors rightly point out that despite their significant contribution to book culture, the work of book publicists is often underestimated in the industry and academic literature. This indicates the need to recognise their influence and importance in the process of book promotion, as well as the need for further research to adequately assess their contribution to the book industry.

According to the authors of the current study, the following strategies can be recommended to support and

develop book publishing in the face of current challenges and changes:

1. Develop and implement financial support programmes for publishing houses and bookstores, including government donations, grants and subsidies, which will help reduce financial pressure on the industry and promote the development of new publications.

2. Develop and support legislative initiatives aimed at protecting the rights of authors, combating piracy and stimulating investment in the industry. It is also important to provide support from the state in the form of tax benefits for publishers and bookstores.

3. Invest in the development of digital platforms for book distribution, including e-books and audiobooks. Develop new technologies to improve the consumer experience and attract new readers.

4. Introduce campaigns to promote reading and book culture among young people and the general public. Organise book festivals, literary competitions and other cultural events.

5. Attract international grants and investments, develop cooperation with foreign publishing houses and libraries, which will allow Ukrainian book publishers to integrate into the global book market and promote their publications abroad.

6. Invest in improving the quality of book editing, design and printing. This will help publications to be competitive in the market and attract more readers.

7. Develop and implement new educational programmes and courses to train specialists in book publishing, marketing and advertising. This will help to improve the professional level of personnel in the industry.

8. Ensure regular updating of library collections, simplify book procurement procedures and provide access to new publications through various distribution channels.

In order to support and develop book publishing in the face of current challenges, it is therefore necessary to introduce financial support for publishers, develop digital platforms, ensure legislative protection of authors' rights, promote reading, integrate into the global market, and invest in education and improve the quality of publications. These strategies will help reduce financial pressure on the industry and increase its competitiveness.

Conclusions

The article emphasises the key role of the book as an important carrier of national culture, history and identity, which plays a significant role in shaping public consciousness and cultural development. Modern Ukrainian book publishing is facing numerous challenges, such as economic difficulties, the impact of globalisation and the need to adapt to new technological realities, which requires a comprehensive approach to ensure the sustainable development of the industry. Economic and social difficulties, including a lack of funding and resources, as well as the impact of the pandemic and martial law, create additional obstacles to the development of book

publishing. Legislative initiatives to support book publishing have a significant impact on the industry, but the implementation of these initiatives often faces difficulties and needs further improvement. The digital transformation has had a significant impact on book publishing, changing the processes of creating, producing and distributing books. The emergence of new technologies, such as e-books, requires publishers to adapt to new conditions and opportunities. To preserve and develop book publishing in Ukraine, it is necessary to continue to support publishing houses and bookstores through funding, subsidies and concessional lending, as well as focus on infrastructure development and reading promotion. International experience in book publishing can serve as a useful benchmark for Ukraine, and cooperation with foreign partners and integration into the global book market can help Ukrainian publishers develop and find new opportunities for growth. Public initiatives, such as reading support pro-

grammes and cultural campaigns, can contribute to the promotion of books and the development of book culture in Ukraine. This study emphasises the need for a comprehensive approach to supporting Ukrainian book publishing, taking into account both the current challenges and opportunities that are opening up in the context of digital transformation and globalisation. Further research should focus on analysing the effectiveness of existing legislative initiatives, assessing the impact of new technologies on the book market, and the possibilities for international cooperation and innovative strategies to support and develop book publishing in Ukraine.

■ Acknowledgements

None.

■ Conflict of Interest

None.

■ References

- [1] Afonin, O. (2020). On the fate of Ukrainian book publishing: Reality and prospects. *Bulletin of the Book Chamber*, 9, 10-15. doi: [10.36273/2076-9555.2020.9\(290\).10-15](https://doi.org/10.36273/2076-9555.2020.9(290).10-15).
- [2] Berendiev, A. (2023). [State language in the field of book publishing and book distribution](#). *Linguistics and linguodidactics*. In *Achievements and prospects for development: Materials of the All-Ukrainian scientific and practical conference of young scientists* (pp. 19-23). Odesa: South Ukrainian National Pedagogical University Named After K.D. Ushynskyi.
- [3] Blattmann, U., Fachin, J., & Werlang, E. (2020). Perspectives of the academic open access e-book. *Revista Ibero-Americana De Ciência da Informação*, 13(2), 522-547. doi: [10.26512/rici.v13.n2.2020.21154](https://doi.org/10.26512/rici.v13.n2.2020.21154).
- [4] Buryak, S. (2021). Book publishing activity of modern Ukraine: State, trends and prospects for development. *Bulletin of the Book Chamber*, 1, 10-21. doi: [10.36273/2076-9555.2021.1\(294\).10-21](https://doi.org/10.36273/2076-9555.2021.1(294).10-21).
- [5] Cordón-García, J.-A., & Muñoz-Rico, M. (2022). Publishing, books and reading: Spaces of authorship, visibility, and socialisation. *Profesional De La Información*, 31(2), article number e310205. doi: [10.3145/epi.2022.mar.05](https://doi.org/10.3145/epi.2022.mar.05).
- [6] Draft Law of Ukraine No. 6287 "On Amendments to Certain Laws of Ukraine on Stimulating the Development of Ukrainian Book Publishing and Book Distribution". (2021, November). Retrieved from https://w1.c1.rada.gov.ua/pls/zweb2/webproc4_1?pf3511=73161.
- [7] Esteve, A. (2024). Copyright and open access to scientific publishing. *International Review of Intellectual Property and Competition Law*, 55, 901-926. doi: [10.1007/s40319-024-01479-z](https://doi.org/10.1007/s40319-024-01479-z).
- [8] Frohlich, D.M., Yuan, H., Corrigan-Kavanagh, E., Mameli, E., Scarles, C., Sporea, R., Revill, G., Brown, A.V., & Bober, M. (2024). A market-ready ecosystem for publishing and reading augmented books. In *Human-centered design, operation and evaluation of mobile communications* (pp. 58-75). Cham: Springer. doi: [10.1007/978-3-031-60487-4_5](https://doi.org/10.1007/978-3-031-60487-4_5).
- [9] Gandy, M. (2023). Books under threat: Open access publishing and the neo-liberal academy. *Area*, 55(4), 565-570. doi: [10.1111/area.12877](https://doi.org/10.1111/area.12877).
- [10] Holovko, O. (2022). Problems of Ukrainian book publishing in the sphere of design. *Printing Horizon*, 2(12), 83-96. doi: [10.20535/2522-1078.2022.2\(12\).270889](https://doi.org/10.20535/2522-1078.2022.2(12).270889).
- [11] Holubovskiy, R. (2024). Trends of the Ukrainian book market during the war. *Economy and Society*, 61. doi: [10.32782/2524-0072/2024-61-109](https://doi.org/10.32782/2524-0072/2024-61-109).
- [12] Law of Ukraine No. 2309-IX "On Amendments to Certain Laws of Ukraine on Establishing Restrictions on the Import and Distribution of Publishing Products Relating to the Aggressor State, the Republic of Belarus and the Temporarily Occupied Territories of Ukraine". (2022, June). Retrieved from <https://zakon.rada.gov.ua/laws/show/2309-20#Text>.
- [13] Law of Ukraine No. 2313-IX "On Amendments to Certain Laws of Ukraine on Stimulating the Development of Ukrainian Book Publishing and Book Distribution". (2022, June). Retrieved from <https://zakon.rada.gov.ua/laws/show/2313-IX#Text>.
- [14] Magadán-Díaz, M., & Rivas-García, J.I. (2022). Publishing industry: A bibliometric analysis of the scientific production indexed in Scopus. *Publishing Research Quarterly*, 38, 665-683. doi: [10.1007/s12109-022-09911-3](https://doi.org/10.1007/s12109-022-09911-3).

- [15] Miller, C.D., & Wang, R.D. (2024). Product digitization and differentiation strategy change: Evidence from the book publishing industry. *Strategic Management Journal*, 45(7), 1241-1272. doi: [10.1002/smj.3586](https://doi.org/10.1002/smj.3586).
- [16] Novachuk, A.R., & Ivanova, N.I. (2019). Publishing strategies of the Dnipro publishing house "Gerda". *Mass Communication in Global and National Dimensions*, 12, 129-135.
- [17] Parnell, C., & Driscoll, B. (2023). Institutions, platforms and the production of debut success in contemporary book culture. *Media International Australia*, 187(1), 123-138. doi: [10.1177/1329878X211036192](https://doi.org/10.1177/1329878X211036192).
- [18] Radchenko, A. (2023). Enriching library collections in Ukraine: Impact of "Scientific Book". *Manuscript and Book Heritage of Ukraine*, 31, 227-253. doi: [10.15407/rksu.31.227](https://doi.org/10.15407/rksu.31.227).
- [19] Ren, D., & Kang, Z. (2021). How COVID-19 has affected China's publishing industry. *Publishing Research Quarterly*, 37, 494-502. doi: [10.1007/s12109-021-09829-2](https://doi.org/10.1007/s12109-021-09829-2).
- [20] Romaniuk, N. (2022). Ecotrends in Ukrainian book publishing. *Ukrainian Information Space*, 2(10), 98-109. doi: [10.31866/2616-7948.10.2022.269827](https://doi.org/10.31866/2616-7948.10.2022.269827).
- [21] Safonov, Y., Bazhenkov, I., & Zayets, S. (2023). Practical aspects of publishing textbooks, pedagogical/teaching and methodological guides and normalizing the cost of materials. *Baltic Journal of Economic Studies*, 9(1), 152-162. doi: [10.30525/2256-0742/2023-9-1-152-162](https://doi.org/10.30525/2256-0742/2023-9-1-152-162).
- [22] Semenyuk, A., & Bagmut, I. (2024). [Publishing activity: The main differences in the work of Ukrainian and American publishers](https://doi.org/10.31866/2616-7948.10.2022.269827). *Universum*, 4, 127-134.
- [23] Shenderivska, L.P., Huk, O.V., & Mokhonko, G.A. (2022). Transformation of business models of publishing houses in the conditions of war and pandemic. *Economic Space*, 179, 79-85. doi: [10.32782/2224-6282/179-12](https://doi.org/10.32782/2224-6282/179-12).
- [24] Shpak, V. (2024). Ukraine in the context of world book publishing. *Integrated Communications*, 1(17), 187-195. doi: [10.28925/2524-2644.2024.1723](https://doi.org/10.28925/2524-2644.2024.1723).
- [25] Sytnyk, V. (2023). Access strategies in Ukrainian digital bookstores. *Printing Horizon*, 2(14), 243-254. doi: [10.20535/2522-1078.2023.2\(14\).295407](https://doi.org/10.20535/2522-1078.2023.2(14).295407).
- [26] The official position of the Ukrainian Book Institute on granting certificates and subsidies. (2023). Retrieved from <https://ubi.org.ua/uk/news/kategoriya-2/oficiyna-poziciya-ukra-nskogo-institutu-knigi-schodo-nadannya-sertifikativ-ta-subsidiy>.
- [27] Trishchuk, O.V., & Kiryak, V.S. (2023). Publishing business in the context of the Russian-Ukrainian war. *Technology and Technique of Printing*, 2(80), 92-98. doi: [10.20535/2077-7264.2\(80\).2023.281284](https://doi.org/10.20535/2077-7264.2(80).2023.281284).
- [28] Weber, M., Parnell, C., & Dane, A. (2023). Book publicists and the labour of cultural intermediation. *Continuum*, 37(3), 365-380. doi: [10.1080/10304312.2023.2237708](https://doi.org/10.1080/10304312.2023.2237708).
- [29] World Intellectual Property Organisation. (2020). Retrieved from <https://www.wipo.int/edocs/pubdocs/en/wipo-pub-1064-2022-en-the-global-publishing-industry-in-2020.pdf>.
- [30] Yatskiv, Y.S., Vakarenko, O.G., & Didenko, Y.V. (2023). Scientific and publishing activities of the NAS of Ukraine in the context of the Russian-Ukrainian war. *Bulletin of the National Academy of Sciences of Ukraine*, 6, 100-105. doi: [10.15407/vishn2023.06.100](https://doi.org/10.15407/vishn2023.06.100).
- [31] Zubko, N., & Stadnyk, O. (2021). [Publishing in the system of book communication: The Ukrainian context](https://doi.org/10.15407/vishn2023.06.100). In *The 10th international academic conference* (pp. 132-133). Lviv: Lviv Polytechnic National University.

Підтримка українського книговидання в контексті сучасних соціокультурних викликів

Сергій Улько

Аспірант

Університет Григорія Сковороди в Переяславі,
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
<https://orcid.org/0009-0008-9575-8370>

Анотація. Актуальність роботи полягає у збереженні української культурної спадщини через підтримку книговидання в умовах глобалізації, економічних труднощів та цифрової трансформації. Метою дослідження був всебічний аналіз стану, ключових проблем галузі та окреслення перспектив підтримки українського книговидання в умовах сучасних викликів для забезпечення його конкурентоспроможності як на внутрішньому, так і на міжнародному ринках. Під час дослідження було використано методи аналізу, систематизації, узагальнення. Результати дослідження вказують на необхідність розробки ефективних стратегій для підтримки українського книговидання в умовах сучасних викликів, зокрема через адаптацію до змінюваних умов ринку. У даній статті розглянуто важливість книги як основного носія культури та її багатоаспектну роль у суспільстві. Зокрема, розглянуто економічні труднощі, які постають перед видавцями, включаючи фінансові обмеження та проблеми з доступом до ресурсів. Важливу роль відіграє вплив глобалізації, яка не лише відкриває нові можливості для інтеграції української книги в міжнародний контекст, але й створює конкуренцію з боку іноземних видань. Простежено законодавчі ініціативи, спрямовані на стимулювання розвитку українського книговидання і книгорозповсюдження. Зокрема, розглянуто заходи, які були впроваджені для покращення умов роботи видавців, розширення книжкового ринку, збільшення кількості книгарень та накладів книг. Однак, попри ці ініціативи, існують проблеми, що потребують подальшого вирішення для забезпечення стійкого розвитку галузі. Розглянуто вплив цифрової трансформації на книговидання, що включає процеси створення, виробництва і розповсюдження книг. Цифрові технології значно змінюють традиційні системи книговидання, відкриваючи нові можливості для доступу до літератури та інноваційні формати представлення книг. Рекомендовано стратегії для підтримки і розвитку книговидання в умовах сучасних викликів та змін. Практичне значення полягає у окресленні основних стратегій для підтримки та розвитку українського книговидання, що може допомогти видавництвам, авторам і книгопродавцям ефективно адаптуватися до сучасних викликів і умов ринку.

Ключові слова: видавнича галузь; історія книговидання; цифровізація книговидання; книгорозповсюдження; культурна спадщина; конкурентоспроможність; видавнича стратегія



Development of new methods for assessing the quality and effectiveness of live broadcasts using digital human technologies

Xi Chen

PhD, Researcher

Chiang Mai University

50200, 239 Huay Kaew Rd., Chiang Mai, Thailand

<https://orcid.org/0009-0009-3589-6330>

Siva Shankar Ramasamy*

PhD, Lecturer

Chiang Mai University

50200, 239 Huay Kaew Rd., Chiang Mai, Thailand

<https://orcid.org/0000-0002-6160-5949>

Bibi She

PhD, Researcher

Chiang Mai University

50200, 239 Huay Kaew Rd., Chiang Mai, Thailand

<https://orcid.org/0000-0002-2451-1724>

Piyachat Udomwong

PhD, Researcher

Chiang Mai University

50200, 239 Huay Kaew Rd., Chiang Mai, Thailand

<https://orcid.org/0000-0002-3915-6411>

Abstract. The aim of this study was to create a new, comprehensive methodology for assessing the quality and performance of video broadcasts using virtual human technologies. The research methodology included analysing existing methodologies and adapting them to the specifics of virtual hosts. New evaluation tools were developed, considering parameters such as technical quality, emotional support, interactivity, social presence, streamer attractiveness and intention to continue watching. The main results of the study showed that technological aspects of video streaming have a significant impact on viewers' perception of such videos. High video and audio quality, and broadcast stability increase audience satisfaction and engagement. In addition, the emotional interaction between the virtual host and the audience promotes a deeper understanding and increases trust. The interactivity and social presence of the virtual host create a sense of community and engagement, which positively affects the overall perception of the broadcast. Viewers' self-efficacy, information overload and cognitive dissonance factors were also examined, which helps to better understand the psychological state of viewers. The findings suggest that in order to achieve a high level of authenticity and trust in virtual influencers, it is necessary to consider technological aspects, aesthetic aspects, the level of trust in the host, parameters of its audience (their motivations, cultural and personal characteristics that can affect the specifics of assessing the quality and effectiveness of the broadcast), parameters of the host itself (realism, emotional expressiveness, interactivity, presence, and absence of humour, and so on). The proposed methodology allows for a comprehensive assessment of all these parameters, contributing to the improvement of the quality and effectiveness of live broadcasts with virtual hosts

Keywords: virtual avatar; host; streaming; perception; metrics

Suggested Citation:

Chen, X., Ramasamy, S.S., She, B. & Udomwong, P. (2024). Development of new methods for assessing the quality and effectiveness of live broadcasts using digital human technologies. *Society. Document. Communication*, 9(2), 80-98. doi: 10.69587/sdc/2.2024.80.



Copyright © The Author(s). This is an open access article distributed under the terms of the Creative Commons Attribution License 4.0 (<https://creativecommons.org/licenses/by/4.0/>)

*Corresponding author



Introduction

With the development of digital technologies and the popularity of live broadcasts, there is a need for new methods to assess their quality and effectiveness. Virtual hosts and avatars controlled by artificial intelligence (AI) are becoming increasingly common, offering unique opportunities to interact with audiences. Traditional evaluation methods may not take into account the specific features and benefits of these technologies. The development of new methods will enable more accurate analysis of content quality, audience engagement and overall broadcast performance, which is important for optimizing the use of digital hosts and increasing viewer satisfaction.

A number of studies have proven a significant difference between the perception of online broadcasts with and without a presenter in the frame. In a study by J. Chen & J. Liao (2022), the authors indicated that on-screen presenters create a strong sense of social presence and interaction, which has a positive effect on viewers' perception and engagement. Viewers feel that their participation is crucial when the presenter actively interacts, responds to comments, and is visually present on screen. The presenter's appearance and charisma also play a pivotal role. A study by P. Schuck *et al.* (2022) showed that the attractiveness of the presenter increases the sense of social presence and the desire to continue watching the broadcast. Presenters who show emotion and actively interact with the audience help to create a tighter emotional and social contact, which increases viewer engagement. Broadcasts with an on-screen presenter often include interactive elements such as polls, games, and real-time reactions to comments, making the viewing experience more dynamic and engaging, helping to keep viewers' attention. A study by J. Lv *et al.* (2022) confirmed that having a presenter in the frame allows for emotional support, comfort and greater engagement with the content, which is relevant for creating long-term viewer commitment to a channel or platform. It also revealed that virtual hosts have a greater impact on perceptions of social presence compared to real hosts, which is related to viewers' interest in anime and virtual characters. At the same time, real hosts elicited a higher level of trust from viewers compared to virtual hosts.

The difference between the perception of a virtual person (avatar) and a real presenter has been investigated by many scholars. For example, in the articles by S. Park & R. Catrambone (2021), the authors indicate that virtual avatars with anthropomorphic features cause strong social reactions in viewers, can stimulate social interaction not only by using facial appearance, but also by using voice (here it is critical to note that synchronization of voice and facial movements leads to a stronger social reaction compared to using only voice or only face). In the article by Y. Zhang *et al.* (2023), the authors provide evidence for the positive impact of virtual presenters on viewer engagement (especially those

that are AI-driven and can respond to viewers' actions in real-time). In the study by D. Kim & D. Jo (2022), the authors also point out that while real presenters are often perceived as more trustworthy and authentic (which increases viewer trust and emotional engagement), and their ability to demonstrate live reactions and empathy creates deeper emotional connections and viewer satisfaction, virtual presenters are quite capable of achieving a similar effect, especially if they are well animated and have natural human features (which reduces viewer cognitive stress). And at the same time, any problem with the avatar's realism causes an immediate reaction of discomfort, distrust and sometimes even fear (the uncanny valley effect) (Song & Shin, 2024).

A study by M. Gerlich (2023) showed that virtual hosts are perceived as more predictable and reliable compared to real people, as their behaviour can be programmed for better content control and audience interaction. They effectively increase viewer engagement and content satisfaction by responding quickly to user requests, creating a sense of live interaction. Virtual hosts can be tailored to the needs of specific audiences, personalizing messages. Hosts with high levels of animation and human-like characteristics promote social interaction and reduce the psychological distance between host and viewer.

Thus, the perception of virtual people by the audience of online broadcasts has been studied quite deeply, but quite often traditional metrics are used for measurements, which are not always suitable for such tasks in the context of the study of virtual avatars, or non-unified author's methods, which differ from study to study and do not provide a complete toolkit for assessing the quality and effectiveness of live broadcasts using digital technologies of virtual avatars (hosts).

The aim of this research was to develop new methods for assessing the quality and effectiveness of live broadcasts using digital people technologies. To achieve this, the following tasks were formulated: 1) analysing existing metrics for assessing the quality and effectiveness of live broadcasts; 2) developing an understanding of the main existing methods for assessing the quality and effectiveness of live broadcasts using digital human technologies; 3) identifying their limitations and areas for improvement when using digital human technologies; 4) developing innovative assessment methods that take into account the characteristics of digital avatars and virtual hosts; 5) formulating a new methodology for assessing the quality and effectiveness of live broadcasts using digital human technologies; 6) developing new methods for assessing the quality and effectiveness of live broadcasts using digital human technologies.

Materials and Methods

The research involved a detailed review of existing metrics and techniques used to assess the quality and

effectiveness of live-streaming. Aspects such as sense of community, emotional support, interactivity, social presence, attractiveness of the streamer and intention to watch were considered. Based on this analysis, a new methodology was developed, including the adaptation of existing scales and metrics for the specifics of virtual hosts. Such features as the specificity of emotions expressed by virtual avatars, broadcast quality, technical reproduction, realism of virtual streamers and others were taken into account. The evaluation methodology developed consisted of six blocks that included defining key parameters.

A video and audio technical quality assessment block was formulated according to the Absolute Category Rating (ACR) methodology (in which viewers watch a video and rate it on a Likert scale from 1 to 5, where 1 is the lowest score and 5 is the highest) and the methodology of comparing the evaluated streaming broadcast with a reference quality video and the viewer's Degradation Degree Rating (DCR) of the streaming broadcast on a five-point scale, which results in the calculation of an average score. The questionnaire consisted of twenty thematic questions focusing on the subjective perception of video, audio and their combination, and viewer evaluation.

A block of measurement evaluation and analysis of technical aspects and features of the platform on which the broadcast with a virtual host is conducted included fundamental monitoring of network performance, measurement of server performance, analysis of video and audio quality, testing of the broadcast on various devices and platforms, including mobile, latency and synchronization analysis, evaluation of user experience, logging and error analysis, and use of A/B testing. The measurement block was carried out by the experimenter without the involvement of respondents and involved the use of special tools (such as Google Analytics, Hotjar, UserTesting and so on).

Block for studying the types of viewers and their characteristics included questionnaire survey of respondents. For these purposes, a questionnaire consisting of 29 questions was used, as well as a five-question questionnaire to assess viewer self-efficacy, information overload, service overload, assessment of users' dependence on streams (platform, stream content), assessment of cognitive dissonance. A block for evaluating the virtual host itself, considering the full range of relevant parameters, consisting of a 65-question questionnaire, where a Likert scale from 1 to 5 is used to evaluate each parameter. A unit for evaluating viewers' interaction with the host while watching a broadcast consisted of a 20-question questionnaire where a Likert scale from 1 to 5 is used to evaluate each parameter.

A unit for assessing the quality and effectiveness of content consisted of a 25-question questionnaire that uses a Likert scale of 1 to 5 to rate each parameter. Given the combination of the results of the application of all six blocks, the final result of the evaluation of the

effectiveness and quality of live broadcasting using a virtual human (host) was calculated.

Results

Disadvantages of existing techniques

Evaluating the quality and effectiveness of live broadcasts is an important task, as such broadcasts have become an integral part of the media industry, education, and marketing. Existing evaluation methods range from simple metrics to sophisticated analytical tools, but each has its own limitations and challenges. The most common traditional evaluation methods include quantitative metrics such as number of views, viewing time, number of comments and likes. These provide a basic understanding of the popularity of the broadcast, but do not always reflect the true quality of the content and the level of audience engagement.

For example, the view count metric determines how many times a broadcast was launched, but does not take into account how much time each viewer spent watching and how closely they followed the content. The Watch Time metric shows the total time viewers spent watching, which is more informative but still does not provide a full understanding of audience engagement. Interaction metrics (comments, likes, reposts) can show viewers' reactions, but are easily manipulated and do not always reflect true opinion. They also do not separate comments from real people from bots and do not differentiate the number of comments from different people and doubles, which distorts the real statistics. With the development of AI and machine learning technologies, methods that analyse viewers' behaviour in real-time, including their emotional reactions and level of engagement, have emerged. These methods are more accurate in assessing content quality, but require significant computational resources and may face data privacy issues.

Significant limitations of current methods encompass:

- ✓ methodological limitations (traditional and advanced metrics do not take into account the qualitative aspects of interaction with content and do not show how useful or interesting it was);
- ✓ technical barriers (the use of AI and machine learning requires significant resources and high-quality data, difficult to implement and maintain);
- ✓ ethical and legal issues (collecting and analysing data on viewer behaviour can raise privacy and data protection concerns, especially with regard to the use of data from the Internet);
- ✓ technical barriers (the use of AI and machine learning requires significant resources and high-quality data, difficult to implement and maintain).

In addition, evaluation methods often do not take into account differences in internet use across regions and cultures, which can lead to misleading data and incorrect conclusions.

In order to better assess the quality and effectiveness of live broadcasts, it is necessary to consider not only quantitative but also qualitative aspects of audience interaction. The use of new technologies such as AI and machine learning opens up new opportunities for more accurate analyses, but also requires addressing a number of technical and ethical issues. There are also author's versions of assessing the quality and effectiveness of live broadcasts, including those carried out by a virtual avatar.

For example, the study by J. Chen & J. Liao (2022) analyses social presence, defined as the experience and feeling that arise in live-streaming through the interaction between viewers and streamers based on emotions and community atmosphere. The study confirmed that the level of social presence affects the number of views, interactions and viewer engagement, considering the role of streamer attractiveness. A survey of 386 viewers used the metrics of sense of community (Sjöblom & Hamari, 2017), emotional support, interactivity (Chen & Lin, 2018), social presence (Gefen & Straub, 2004), streamer attractiveness and intention to watch based on a Likert scale (1 to 5). Data were analysed using structural equation model (SEM) and partial least squares method (PLS-SEM), with reliability and validity checks (Cronbach's α and CR). Streamer attractiveness evaluation took into account external and behavioural factors, applicable also to virtual hosts with their visual and voice characteristics. Aspects of moderation analysis from the study may help to formulate criteria for analysing the differences between virtual and real hosts.

However, the study is limited because it was conducted on real streamers, which makes it difficult to transfer the results to virtual hosts, requiring adaptation of the scales. Perceptual subjectivity is also relevant, as metrics such as emotional support and attractiveness can vary. No consideration has been given to the characteristics of emotion expression by virtual avatars, broadcast quality, realism of the virtual streamer, and the presence of the "uncanny valley" effect. There are no methods to measure and analyse the technical aspects and features of the platform on which the broadcast with the virtual host takes place. The use of questionnaires and self-reports may lead to bias in the data regarding virtual hosts.

Studies of viewer types, such as the study by P. Schuck *et al.* (2022), show that viewer characteristics strongly influence the evaluation of broadcasts by virtual avatars. The viewers were divided into groups: System Alterer (SA), Financial Sponsor (FS), Content Observer (CO), Streamer-focused Observer (SO) and Social Player (SP), each influencing the selection and evaluation of streams. The methodology, based on questionnaire, exploratory and confirmatory factor analysis and SEM, analyses different aspects of viewers' interaction with streamers. This questionnaire can be adapted for virtual hosts. Minuses of the study include the limited application of results based on real streamers to virtual hosts. Metrics of emotional support and likeability can

be subjective and culturally skewed, causing bias. Important technical aspects for virtual hosts, such as visual and voice characteristics, are not taken into account. The realism of the virtual streamer requires further research and adaptation of the methodology. Thus, the proposed methodology requires adaptation for application to streamers with virtual hosts.

In the article by H.-C. Chen *et al.* (2022), the authors present a methodology for assessing viewers' visual behaviour during Facebook Live broadcasts using eye movement tracking technology to analyse consumers' perception and behaviour on e-commerce platforms. The study focuses on four eye movement metrics: first fixation latency, first fixation duration, total fixation duration and number of fixations. These metrics allow to assess the distribution of visual attention and participants' behaviour in different regions of interest (ROIs) while watching the broadcasts.

Data analysis showed that men and women exhibit different patterns of visual behaviour. Men first fix their attention on the product brand (ROI3), while women first focus on the presenter of the broadcast (ROI1). Men fix their attention on the product itself for the longest time (ROI2), while women fix their attention on the product brand (ROI3). Both genders pay the most attention to the product (ROI2) and the presenter (ROI1). This confirms the importance of these areas to viewers. In addition, the presenter of the broadcast has been shown to be a significant factor influencing the attention and perception of the audience.

Continuing the theme of assessing spectator behaviour, it is worth noting the study by S. Zhang and Y. Pan (2023), which analysed the factors influencing users' intentions to stop using pan-entertainment mobile platforms for live broadcasts. The authors found that information overload, service overload, and user dependency have a positive effect on cognitive dissonance, leading to intentions to stop using the platform, while self-sufficiency reduces the impact of cognitive dissonance. Although this study does not fulfil the objectives of this analysis, it is important to consider cognitive and affective mechanisms when developing a model for assessing the quality and effectiveness of streaming with virtual hosts.

The development of the virtual people evaluation methodology was based on a number of studies that examined the influence of virtual Influencers on consumer behaviour and attitudes towards brands, trust, purchase intention and preferences between virtual and real Influencers (Gerlich, 2023). It has been investigated how the human traits of virtual characters influence users' social responses (Park & Catrambone, 2021), and the impact of the realism and believability of virtual avatars on consumers' perceptions and trust (Andersson & Sobek, 2020). The difference in audience perceptions of virtual presenters driven by "assisted" and "controlled" AI-human interaction was studied, as well as the influence of "playfulness" and "humour" elements. These

studies have shown that virtual influencers have a significant impact on consumer behaviour and preferences. Consumers trust virtual influencers more than real ones due to the lack of personal interests and the possibility of brands having full control over their behaviour. Virtual Influencers evoke strong parasocial relationships, which enhances trust and engagement. Attractive features of virtual hosts include lack of physical ageing, stability of visual appeal, ability to work without interruption, and lack of scandal.

It has also been found that virtual people can elicit social reactions similar to real people if they possess enough human features. A combination of facial expressions and voices elicits stronger social reactions than either face alone or voice alone. Perceptions of authenticity depend on the realism of appearance, behaviour and audience interaction, although high levels of realism can both increase and decrease perceptions of authenticity depending on context and consumer expectations. Participants with experience in games and virtual worlds perceive realistic virtual influencers favourably compared to those with less experience.

Virtual presenters driven by “assisted” AI-human interaction have also been found to promote higher levels of audience perception and engagement compared to “controlled” AI-human interaction, but elements of “playfulness” and “humour” can mitigate this difference. The types and intensity of parasocial relationships between virtual humans and audiences also have a significant impact on the effectiveness of using such leading broadcasts (Brown, 2020). This paper is complemented by techniques for evaluating the effectiveness of virtual influencers from the work of E. Moustakas *et al.* (2020), which include expert interviews with digital media specialists, emphasizing the success of the marketing strategy and the appropriateness of the virtual host personality selection.

Studies on the influence of information quality and interaction on the intention of customers to purchase deserve special mention (Zhang *et al.*, 2021). They showed that the quality of information, expressed in terms of credibility, vividness and usefulness, is directly related to audience behaviour and response, as is the quality of interaction with the virtual influencer (measured by responsiveness, empathy and real-time interaction). This study highlights that when evaluating the effectiveness of live-streaming, not only the quality of the streamer and the realism of the virtual host, but also the information it broadcasts should be considered.

In addition, this study has already mentioned the importance of considering technical and mechanical factors that influence the evaluation of the quality and

effectiveness of live broadcasting using virtual hosts. This primarily concerns audio and video quality, which can significantly affect the audience’s perception of the image and the realism of the virtual host image. There are many studies aimed at investigating this parameter. The paper investigates audio and video (A/V) quality and uses the LIVE-SJTU (A/V-QA) database of 336 A/V sequences to study the perception of the combined quality of A/V signals (Min *et al.*, 2020). Video and audio content quality assessment methods have also been applied in a study, where the 60 most relevant statistical features are identified out of 763 statistical features for streaming video quality assessment, based on which the VIDEVAL model is created. VIDEVAL provides high performance at low computational cost, suitable for user video quality assessment (Tu *et al.*, 2021). The book by S. Akramullah (2014) discusses objective and subjective metrics for video quality assessment, including peak signal-to-noise ratio and modified peak signal-to-noise ratio, and scores from a group of viewers. The latter metric is the most adaptive and suitable for evaluating the quality and effectiveness of live broadcasts with virtual humans, allowing the most accurate match to the perception by human vision and intertwined with other metrics. Thus, based on the above-described methods, authors can conditionally distinguish several most essential blocks of evaluation of live broadcasts with virtual influencers or hosts.

Proposed estimation methodology

The first block should include an assessment of the technical quality of the video-audio signal, as this component can very much affect the perception of any content of any presenter (organic and virtual). Based on the research data of S. Akramullah (2014), X. Min *et al.* (2020) and Z. Tu *et al.* (2021) this block can be implemented using: ACR method, where viewers watch a video and rate it on a scale from 1 to 5, where: 5 is excellent and 1 is very bad; a method of comparing the evaluated streaming broadcast with a reference quality video and the viewer DCR of the streaming broadcast on a five-point scale, where 5 is imperceptible degradation, 4 is perceived but not annoying degradation, 3 is slightly annoying degradation, 2 is annoying degradation, and 1 is very annoying degradation. As a result, the mean average score (MOS) is calculated using the formula (1):

$$MOS = \frac{n_{ACR} + n_{DCR}}{n}, \quad (1)$$

where n – number of viewers (ratings).

The assessment should also be accompanied by a test-type questionnaire with 20 questions (Table 1).

Table 1. Video and audio quality assessment questionnaire

No.	Parameter	Question
1	Overall clarity	How crisp and detailed does the video look?
2	Colour accuracy	How natural and realistic do the colours look?

Continued Table 1.

No.	Parameter	Question
3	Smoothness of movement	How smooth does the motion look in the video?
4	Noise and interference in video	How noticeable is noise and interference in the image?
5	Edge sharpness	How sharp do the edges of the objects in the video look?
6	Compression artefacts	How noticeable are compression artefacts (e.g., blocks, bars)?
7	Contrast	How well are the dark and light areas distinguishable?
8	Brightness	How properly adjusted is the video brightness?
9	Image stability	How stable is the image, with no jitter or distortion?
10	Sound clarity	How clear and intelligible is the sound?
11	Volume	How optimally adjusted is the sound volume?
12	Noise and interference in audio	How noticeable is noise and interference in audio?
13	Sound balance	How well balanced are the volume levels between the different sound elements (voice, music, effects)?
14	Bass clarity	How clean and pleasant do the bass frequencies sound?
15	High frequency clarity	How clean and pleasant do the high frequencies sound?
16	Echo and reverberation	How noticeable are echo and reverberation, if present?
17	Synchronizing sound and video	How well synchronized are the sound and picture?
18	Dynamic range	How well are soft and loud sounds transmitted?
19	Overall perception of the audiovisual combination	How harmonious are the audio and video as a whole?
20	Emotional perception	How enjoyable and comfortable do you find watching videos in general?

Source: created by the authors

The parameter calculation methodology and interpretation of the results involves calculating the arithmetic

mean of the scores received for each question from all participants (Table 2).

Table 2. Interpretation of results

Number of points	Significance	Deciphering
1-1.9	Very low quality	Video (audio) has serious flaws that make them virtually unusable for comfortable viewing or listening
2-2.9	Low quality	Video (audio) has notable problems that significantly affect perception
3-3.9	Average quality	Video (audio) has some disadvantages, but they are not critical and are acceptable to most viewers
4-4.5	Good quality	Video (audio) of high quality with minor imperfections that do not greatly affect the perception
4.6-5	Excellent quality	Video (audio) has minimal or no imperfections, providing an excellent viewing or listening experience and comfort

Source: created by the authors

The calculation steps involve collecting data, calculating the average value for each parameter using formula (2):

$$\text{Average score} = \frac{\sum \text{estimates}}{\text{number of participants}}. \quad (2)$$

The second block, which does not require the involvement of test subjects (stream viewers), should be the block of measurement evaluation and analysis of the technical aspects and features of the platform on which the broadcast with the virtual host takes place. These methods will help to assess the performance, stability, and quality of the broadcast, and identify potential

bottlenecks and areas for improvement. The methods of measurement and analysis may be as follows:

1. Network performance monitoring. Measured parameters: latency, packet loss, bandwidth, jitter. Measurement tools: Wireshark, PingPlotter, NetFlow analysers. Monitoring these parameters can identify network problems affecting broadcast quality.

2. Measuring server performance. Measured parameters: central processing unit usage, random access memory usage, disk I/O activity, network I/O. Tools: Prometheus, Grafana, Zabbix, Nagios. Monitoring of server resources will allow you to determine whether the capacity is sufficient for video processing and broadcasting.

3. Analysing video and audio quality. Measured parameters: resolution, frame rate, bitrate, compression level, audio quality. Tools: FFmpeg, Video Multi-Method Assessment Fusion, PESQ (Perceptual Evaluation of Speech Quality).

4. Testing on various devices and platforms. Parameters measured: compatibility, performance, display quality. Tools: BrowserStack, Sauce Labs, real devices.

5. Latency and synchronization analysis. Measured parameters: streaming latency, audio-video sync. Tools: OBS Studio, Streamlabs, specialized scripts and tools for latency measurement. Measuring latency and checking audio-video sync will help to determine how smooth and synchronized the experience is for the viewers of such a broadcast.

6. User experience evaluation. Parameters measured: load time, user interface/user experience design, stability (crash reports). Tools: Google Analytics, Hotjar, UserTesting. Negative user experience can significantly distort the subjective perception of the quality of the stream as a whole and even affect the evaluation of the attractiveness of the virtual host.

7. Logging and error analysis. Measured parameters: error rate, error types, root cause analysis. Tools:

Elasticsearch, Logstash, Kibana Stack, Sentry, Splunk. Collecting and analysing logs will help to identify errors affecting the broadcast quality.

8. Use of A/B testing. Measurable parameters: engagement, retention, conversion rate. Tools: Google Optimise, Optimizely, VWO. In this case, the specifics of broadcasts on a particular platform are meant, not the general evaluation of the stream or its host.

The third block of the methodology is aimed at studying the types of viewers, since the studies cited above clearly indicate the relationship between the type of viewer (Nasir, 2015), its characteristics, preferences and stereotypes (Chiou *et al.*, 2020), and the manifestation of the effectiveness of live broadcasting, the assessment of its quality by the audience.

This block is intended to record the gender of the viewer (gender self-identification), the presence or absence of previous experience of the audience with games and virtual worlds, the presence of prejudices and cultural or religious peculiarities of perception of virtual people. The questionnaire will also include 25 statements to categorize viewers into the five categories proposed in the work of P. Schuck *et al.* (2022). Thus, the questionnaire will have the following form (Table 3).

Table 3. Questionnaire to determine the type of viewer

Type of viewer	Assertion (question)	Answers
SA	I would like to change what the streamer is showing in the stream	Yes/No
	I would like to change the parts of the game the streamer plays during the stream	
	I like influencing what happens in the game, not just watching	
	I like influencing what happens in the game to support the streamer	
	I like influencing what happens in the game to interfere with the streamer	
FS	I would like to financially support my favourite streamer	
	I financially support the streamer to help maintain good quality content on the stream	
	I donate money to the streamer to show my support	
	I can imagine donating money to streamers	
	I believe that viewers should support streamers whose content they particularly value	
CO	I like watching the game the streamer is broadcasting without the distraction of other viewers	
	I don't like interacting with others in a streamer	
	I'm more interested in what's going on in the broadcast game than I am in interacting with other viewers	
	I'm more interested in what's going on in the game being streamed than I am in interacting with the streamer	
	I don't like it when other viewers distract a streamer	
SO	As a viewer, I care more about the streamer than the game being broadcast	
	I think the streamer is the most important part of the stream	
	I'm interested in learning more about the streamer	
	I prefer to learn more about the current game situation than the streamer	
	I love it when a streamer shares personal stories or experiences	
SP	I love the contests that the streamer carries out	
	I'd like to unlock achievements in the streamer	
	I like collecting rewards while streaming	
	I would like streamers to show/use items (e.g., images, sounds, creations) sent by viewers in the stream	
	I think viewers who watch a lot of streaming should have access to more features in streaming	

Continued Table 3.

Type of viewer	Assertion (question)	Answers
	Your sex (gender self-identification)	
	Your age	
	Do you have experience with games and virtual worlds?	Yes/No
	Do you have prejudices and cultural or religious perceptions of virtual people?	Yes (positive) Yes (negative) No

Source: created by the authors

Dividing viewers into different categories helps to more accurately assess the quality and effectiveness of the stream by understanding the specific needs and preferences of each group. In terms of evaluating the target content, attention should be paid to the scores of SA and CO. SA want to influence the game or stream, so their satisfaction indicates the level of interactivity and the ability to modify content. CO are interested in the gameplay, and their satisfaction indicates the quality and interest of the game, as well as minimal distractions. To assess financial support, consider the performance of FS – viewers who are willing to donate money to the streamer. Measuring their satisfaction helps to understand whether streamers are successfully monetizing their activities. A high level of support from FS indicates that viewers value the content and consider it to be of high quality. In terms of interaction with the streamer, it is worth considering the ratings of SO – viewers who are interested in the personality of the streamer. Their satisfaction helps to assess how successful the streamer is in establishing a personal contact with the audience, how charismatic and interesting he is. Also, relevant are the responses of SP – viewers oriented towards social interactions. Their satisfaction can indicate the effectiveness of introducing game mechanics and social elements in the streamers.

An essential aspect of improving quality and customization is collecting feedback. Feedback and ratings

from each category of viewers will help streamers and platforms understand which aspects of the streams need to be improved. For example, dissatisfaction with SA may indicate a lack of interactivity in the stream. This block can also include a pool of questions related to viewers' self-efficacy and parameters such as information overload, service overload and user dependency, and cognitive dissonance.

The methodology for assessing self-efficacy is to evaluate the user's level of confidence in their ability to cope with technological challenges and manage their use of the platform. Questions to assess self-efficacy:

A. How confident are you that you can effectively use all the features of the streaming platform?

B. How confident are you that you can control your time spent watching streams?

C. How easy is it for you to learn new features and tools on the platform to improve your streaming experience?

D. How confident are you that you will be able to solve any technical problems that arise while watching streams?

E. How confident are you that you will be able to successfully interact with other viewers and the streamer during the stream?

The evaluation is done using Likert scale (1 to 5). The result is presented in Table 4.

Table 4. Decoding of self-efficacy results on a five-point scale

Score	Result	Significance
1-1.9	Very low self-efficacy	The viewer lacks confidence in their ability to use the streaming platform effectively, has significant difficulty using its features and dealing with technical issues, and may need additional support and training.
2-2.9	Low self-efficacy	The viewer has difficulty using the platform but can sometimes manage basic tasks. Mastering new features is stressful and solving technical problems is time-consuming, so he or she may need occasional help and support.
3-3.9	Average self-efficacy	The viewer is relatively confident in their ability to use the platform to watch streams, can learn the basic features and solve most technical problems with some effort, needing support only for complex tasks.
4-4.5	High self-efficacy	The viewer is confident in their ability to use the platform and manage their time, easily learning new features and successfully solving technical problems, rarely needing help or support.
4.6-5	Very high self-efficacy	The viewer is fully confident in their ability to use the streaming platform effectively, easily learns any new features, and quickly solves technical problems. They are able to achieve their streaming goals on their own and need little or no help.

Source: created by the authors

Formula (3) is used to calculate the result (3):

$$\text{Average score} = \frac{\sum \text{estimates}}{\text{number of questions}} \quad (3)$$

Techniques for assessing information overload include assessing the amount of information a user receives and their ability to process that information. Questions to assess information overload:

A. How often do you feel you receive too much information on this platform?

B. How difficult is it for you to process all the incoming data and messages?

C. How often do you feel tired or stressed by the amount of information on the platform?

D. How difficult is it for you to filter crucial information among all the content on the platform?

E. How often do you have to spend a lot of time processing information in order not to miss something important?

The evaluation is done using Likert scale (1 to 5). The result is presented in Table 5. Formula (3) is used to calculate the result.

Table 5. Deciphering the results of information overload on a five-point scale

Score	Result	Significance
1-1.9	Very low overload	The user feels virtually no information overload. Easily processes incoming information and messages
2-2.9	Low overload	The user sometimes feels some information overload, but generally copes with the amount of information. Data processing requires moderate effort
3-3.9	Average overload	The user often feels information overload and has difficulty processing large amounts of information. It takes considerable time and effort to filter and process data
4-4.5	High overload	The user often feels a strong information overload. Processing information causes stress and fatigue, and is time-consuming
4.6-5	Very high overload	The user is constantly experiencing severe information overload. Information processing becomes almost impossible without considerable effort and stress

Source: created by the authors

The methodology for assessing service overload is to evaluate the number of features and services offered by the platform and their impact on the user. Questions to assess service overload:

A. How often do you feel that platform features are redundant or unnecessary?

B. How difficult is it for you to make sense of all the features and services available?

C. How often do you feel the platform offers too many options that you don't need?

D. How confused are you about using the various features and services of the platform?

E. How often do you have difficulty finding the right function among the many available?

The evaluation is done using Likert scale (1 to 5). The result is presented in Table 6. Formula (3) is used to calculate the result.

The methodology of user dependency evaluation is to assess the level of user dependency on the platform and the user's dependency behaviour. Questions to assess user dependency:

A. How often do you feel the need to use the platform, even when it interferes with other activities?

B. How strongly do you feel that you cannot stop using the platform?

C. How often do you neglect other important activities to use the platform?

D. How much irritation or anxiety do you feel when you cannot use the platform?

E. How often do you lose track of the time you spend on the platform?

The evaluation is done using Likert scale (1 to 5). The result is presented in Table 7. Formula 3 is used to calculate the result.

Table 6. Deciphering the results of service overload on a five-point scale

Score	Result	Significance
1-1.9	Very low overload	The user practically does not feel overloaded with services. It is easy to understand all the functions and services of the platform.
2-2.9	Low overload	The user sometimes feels a bit overwhelmed by the services, but generally copes with the number of functions. It takes moderate effort to understand the functions and services.
3-3.9	Average overload	The user often feels overwhelmed by the services and has difficulty using numerous functions. It takes considerable time and effort to understand and utilize all available options.
4-4.5	High overload	The user often feels a strong overload of services. Using functions and services is stressful and time-consuming to master.
4.6-5	Very high overload	The user is constantly experiencing severe service overload. It becomes almost impossible to use the functions without considerable effort and stress.

Source: created by the authors

Table 7. Decoding of user dependency results on a five-point scale

Score	Result	Significance
1-1.9	Very low dependence	User has little or no dependence on the platform (streams). The user easily controls his/her usage and does not experience negative emotions in case of lack of access.
2-2.9	Low dependence	The user sometimes has a weak dependence on streams (platform), but is generally able to control his/her usage. Rarely neglects other activities for the sake of using the platform (watching streams).
3-3.9	Average dependence	User often feels dependent on streaming (platform) and has difficulty trying to reduce usage (viewing) time. May neglect essential tasks and feel irritated when not having access.
4-4.5	High dependence	The user is often highly dependent on streams (platform). Regularly neglects important tasks and experiences severe irritation or anxiety when unable to use the platform (watch streams).
4.6-5	Very high dependence	The user is constantly highly dependent on streams (platform). Unable to control his/her usage, which significantly interferes with other aspects of life and causes severe anxiety when not accessing streams.

Source: created by the authors

The methodology for assessing cognitive dissonance is to evaluate the level of psychological discomfort caused by the user's conflicting thoughts and actions. Questions to assess cognitive dissonance:

A. How often do you feel uncomfortable or annoyed by the use of the platform?

B. How often do you feel that using the platform conflicts with your personal or professional values?

C. How often do you find yourself thinking that you spend too much time on the platform?

D. How often do you feel that using the platform interferes with your core responsibilities and goals?

E. How often do you feel guilty after using the platform for a long time?

The evaluation is done using Likert scale (1 to 5). The result is presented in Table 8.

Table 8. Deciphering the results of the cognitive dissonance assessment on a five-point scale

Score	Result	Significance
1-1.9	Very low dissonance	There is little or no psychological discomfort for the user to use the platform and watch streams, feeling that it aligns with their values and goals.
2-2.9	Low dissonance	The user sometimes experiences slight psychological discomfort, but in general considers that the use of the platform (watching streams) does not contradict their values and goals. Rarely thinks about negative consequences of using the platform, watching streams.
3-3.9	Average dissonance	The user often feels psychologically uncomfortable and thinks that using the platform and watching streams may conflict with their values and goals. Feels irritated or guilty after prolonged or frequent use of the platform and watching streams.
4-4.5	High dissonance	The user often feels a strong psychological discomfort with using the platform and watching streams. Regularly thinks about the fact that it interferes with his/her main duties and goals and feels guilty.
4.6-5	Very high dissonance	The user is constantly experiencing strong psychological discomfort with using the platform and watching streams. Believes that it significantly conflicts with his/her personal or professional values and interferes with the fulfilment of basic duties and goals.

Source: created by the authors

The data is analysed in stages. Data is collected through online surveys of platform users using a Likert scale (1 to 5). Next, statistical analysis is performed using SEM to examine the relationships between variables. Data reliability and validity are tested through factor analysis and internal consistency assessment (Cronbach's α and Composite Reliability). A moderating analysis is then conducted to investigate the effect of self-efficacy on the relationship between information overload, service overload, user dependency and cognitive dissonance. The data are categorized into groups

according to levels of self-efficacy, and differences in the impact on cognitive dissonance are analysed.

Information overload, service overload, reliance on streaming and cognitive dissonance can significantly affect viewers' perception and evaluation of live-streaming. These factors can both positively and negatively impact viewers' overall experience. For example, when receiving too much information, viewers may have difficulty processing it, leading to fatigue and irritation, reducing the ability to focus on key points of the stream and impairing the overall content experience. An

excessive number of features and services can confuse and distract viewers from the main content, causing frustration and reducing stream satisfaction. Streaming addiction can cause feelings of guilt and anxiety, especially if the viewer neglects critical activities for the sake of watching, reducing overall satisfaction and causing cognitive dissonance. Cognitive dissonance, in turn, causes feelings of dissatisfaction and internal conflict, especially if the stream content contradicts the viewer's personal values, which reduces trust in the virtual host and leads to negative evaluation of the stream.

The fourth block of evaluation concerns the virtual host itself. A methodology is proposed for a comprehensive evaluation of virtual hosts, including the following key dimensions: sense of community, emotional support, interactivity, social presence, attractiveness, intention to watch, trust, perception of information, level of expertise, realism, visual authenticity, consistency of behaviour and emotional expressiveness. The evaluation is conducted using online viewer surveys based on a questionnaire using a Likert scale (1 to 5) (Table 9).

Table 9. Virtual host evaluation questionnaire

No.	Question	Response
Sense of community		
1	How much do you feel part of the community while watching a stream with a virtual host?	1 – no feeling at all, 5 – maximum feeling
2	How important is it to you to be part of the community of viewers of this stream?	1 – not important, 5 – very important
3	How often do you interact with other viewers during the stream?	1 – I don't communicate at all, 5 – I communicate all the time
4	How much support do you feel from other stream viewers?	1 – I don't feel it at all, 5 – I feel it all the time
5	How interested are you in participating in discussions related to streaming?	1 – not interested at all, 5 – very interested
Emotional support		
6	How much support do you feel from the virtual host while streaming?	1 – I don't feel it at all, 5 – I feel it all the time
7	How much does a virtual host make you feel better?	1 – not at all, 5 – quite strong
8	How often do you turn to your virtual host for emotional support?	1 – do not apply at all, 5 – constantly apply
9	How important is it to you for a virtual host to be emotionally responsive?	1 – not important, 5 – very important
10	How much does a virtual host help you cope?	1 – not at all, 5 – quite significantly
Interactivity		
11	How often do you interact with the virtual host while streaming?	1 – do not interact at all, 5 – interact constantly
12	How satisfied are you with the level of interactivity of the virtual host?	1 – not satisfied, 5 – completely satisfied
13	How interested are you in participating in the interactive elements of the stream (polls, games, etc.)?	1 – not interested, 5 – very interested
14	How responsive is the virtual host to your comments and questions?	1 – does not react in any way, 5 – actively reacts
15	How important is it to you for a virtual host to be interactive?	1 – not important, 5 – very important
Social presence		
16	To what extent do you feel the presence of the virtual host as if they were a real person?	1 – I don't feel it, 5 – I feel it strongly
17	How much does a virtual host make streaming more personal and social?	1 – not at all, 5 – very much
18	How comfortable are you with interacting with the virtual host?	1 – not at all, 5 – very much
19	How much does a virtual host contribute to a friendly atmosphere on the streamer?	1 – not at all, 5 – very much
20	To what extent do you feel that the virtual host is really in the same space as you?	1 – not at all, 5 – very much
Streamer attractiveness		
21	How attractive do you find the virtual host?	1 – not at all, 5 – very attractive
22	How much does a virtual host get your attention?	1 – not at all, 5 – very much
23	How important is the appearance of the virtual host to you?	1 – not at all, 5 – very much
24	How much does the appearance of a virtual host affect your desire to watch a stream?	1 – not at all, 5 – very much
25	How pretty do you find the virtual host?	1 – not at all, 5 – very pretty

Continued Table 9.

No.	Question	Response
Intention to watch		
26	How likely are you to watch streams with this virtual host in the future?	1 – I won't, 5 – I will definitely do it
27	How interested are you in continuing to watch streams with this virtual host?	1 – not interested, 5 – very interested
28	How much do you like the content that the virtual host provides?	1 – don't like it at all, 5 – like it a lot
29	How much are you looking forward to new streams with this virtual host?	1 – not looking forward to it, 5 – very much looking forward to it
30	To what extent would you recommend this stream to others?	1 – would not recommend, 5 – would highly recommend
Trust		
31	How much do you trust the information provided by the virtual host?	1 – I don't trust at all, 5 – I trust very much
32	How reliable do you consider the virtual host to be?	1 – I consider unreliable, 5 – I consider very reliable
33	How trustworthy is the virtual host to you?	1 – not trustworthy, 5 – totally trustworthy
34	How confident are you in the integrity of the virtual host?	1 – not confident, 5 – completely confident
35	How important is it for you to trust the virtual host?	1 – not important, 5 – very important
Information perception		
36	How relevant is the information from the virtual host to your interests and lifestyle?	1 – not at all relevant, 5 – completely relevant
37	To what extent does the virtual host provide reliable information?	1 – its information is unreliable, 5 – its information is completely reliable
38	To what extent do you find the information from the virtual host useful?	1 – it's useless, 5 – it's very useful
39	How well does the information from the virtual host match your expectations?	1 – does not comply at all, 5 – fully complies
40	How important is it to you to get quality information from a virtual host?	1 – not important, 5 – very important
Expertise level		
41	To what extent do you consider the virtual host to be an expert in the area in question?	1 – I do not consider, 5 – I consider a qualified expert
42	How competent is the virtual host in the information provided?	1 – not at all competent, 5 – very competent
43	To what extent does the virtual host demonstrate in-depth knowledge of their field?	1 – does not demonstrate, 5 – demonstrates profound knowledge
44	How much do you trust the virtual host's judgement on professional matters?	1 – I don't trust, 5 – I completely trust
45	How much does a virtual host help you better understand the topic at hand?	1 – not at all, 5 – very helpful
Realism		
46	How realistic do you find the appearance of the virtual host?	1 – unrealistic, 5 – very realistic
47	To what extent does the virtual host look and act like a real person?	1 – no resemblance at all, 5 – very humanoid.
48	How important is virtual host realism to you?	1 – not important, 5 – very important
49	How well does the virtual host match your perceptions of reality?	1 – does not comply at all, 5 – fully complies
50	How believable is the virtual host in its actions and expressions?	1 – not at all believable, 5 – completely believable
Visual authenticity		
51	How plausible are the facial and body features of the virtual host?	1 – not at all plausible, 5 – completely plausible
52	To what extent are the virtual host's appearance and behaviour consistent with its personality and history?	1 – not consistent in any way, 5 – absolutely consistent

Continued Table 9.

No.	Question	Response
Visual authenticity		
53	How natural does a virtual host look in different situations?	1 – unnatural, 5 – completely natural.
54	How realistic are the textures and lighting of the virtual host?	1 – not realistic at all, 5 – very realistic
55	To what extent does the appearance of the virtual host evoke a sense of authenticity?	1 – does not evoke, 5 – evokes
Behavioural sequence		
56	How consistently does the virtual host behave across platforms?	1 – inconsistently, 5 – completely consistently
57	How transparent and clear are the actions of the virtual host?	1 – non-transparent, 5 – completely transparent
58	How often does a virtual host change its behaviour without explanation?	1 – very often, 5 – rarely
59	How predictable is the virtual host in its actions?	1 – very predictable, 5 – not predictable at all
60	To what extent does the virtual host follow its established identity and history?	1 – does not follow, 5 – follow
Emotional expressiveness		
61	How emotionally expressive is the virtual host?	1 – not emotional, 5 – emotional
62	To what extent does the virtual host convey emotions and feelings?	1 – not plausibly, 5 – very plausibly
63	How important is it to you that the virtual host expresses emotion?	1 – not important, 5 – very important
64	To what extent is a virtual host able to elicit an emotional response from you?	1 – not at all, 5 – fully able
65	How successful is the virtual host in using facial expressions and gestures to convey emotion?	1 – sparsely, 5 – fully

Source: created by the authors

For each parameter, the average score is calculated based on the respondents' answers. The average score for each parameter is calculated as the arithmetic mean of the scores for the corresponding questions. The interpretation of the results stipulates that 1-1.9 score means very low level, 2-2.9 low level, 3-3.9 medium level, 4-4.5 high level, 4.6-5 very high level. Using this methodology, it is possible to comprehensively assess viewer perception and satisfaction with various aspects of a virtual-hosted streamer. The results will help identify strengths and weaknesses in content and interaction, as well as identify areas for improvement. The fifth block

of the evaluation is aimed at examining the interaction with the host. Interaction parameters measured: view count, average watch time, chat activity. Measurement tools: YouTube Analytics, Twitch Analytics, built-in analytical tools of the platforms. It also makes sense to assess the level and quality of parasocial interactions between the host and the audience. A questionnaire with questions aimed at measuring affective, cognitive and behavioural aspects of the interaction will be used. Each aspect will be rated on 5 questions using a Likert scale (from 1 to 5, where 1 is the lowest, negative rating and 5 is the highest, positive rating) (Table 10).

Table 10. Questionnaire for assessing interaction with the virtual host

No.	Question	Response
Interaction		
1	How often do you interact with content created by the virtual host?	
2	How much do you enjoy interacting with the virtual host?	
3	How often does the virtual host respond to your comments and questions?	
4	How important is it to you to be able to interact with a virtual host?	
5	To what extent does the virtual host encourage active viewer participation in the stream?	
Affective parasocial interactions		
6	How often do you feel emotionally connected to your virtual host?	
7	How much do you worry about the virtual host as you would a real person?	
8	How important is it to you to keep the virtual host happy?	
9	To what extent do you experience positive emotions when interacting with a virtual host?	
10	To what extent do you feel that the virtual host understands your emotions?	
Cognitive parasocial interactions		
11	How often do you think about virtual hosting outside of streaming?	

Continued Table 10.

No.	Question	Response
Cognitive parasocial interactions		
12	How interested are you in the information that the virtual host provides?	
13	To what extent do you feel that the virtual host shares your views and beliefs?	
14	How much does the virtual host influence your opinion on various issues?	
15	To what extent do you consider the virtual host to be competent and informed?	
Behavioural parasocial interactions		
16	How often do you interact with the virtual host via comments or chats?	
17	How involved are you in events or activities organized by the virtual host?	
18	How often do you share your virtual host's content with friends or on social media?	
19	How keen are you to support the virtual host (e.g., through donations or subscriptions)?	
20	How often do you mimic or follow the recommendations of a virtual host in your daily life?	

Source: created by the authors

The results require calculating the mean score for each of the three aspects of parasocial interactions (affective, cognitive, behavioural). The mean score for each aspect is calculated as the arithmetic mean of the scores for the respective questions. According to the scores obtained, the score can be interpreted as very low level of interaction (1-1.9), low level (2-2.9), medium level (3-3.9), high level (4-4.5) and very high level of interaction (4.6-5).

A low level of interaction between the host and viewers indicates low interaction efficiency (e.g., viewers' questions and comments go unanswered). This can lead to lower overall satisfaction with the stream, lower audience engagement, fewer viewers and donations, loss of loyalty, and lower likelihood of viewers returning. Low affective parasocial interactions means that viewers do not feel emotionally connected to the virtual host. This can manifest as less viewer attachment and loyalty, lower levels of engagement and participation in the stream, faster loss of interest and switching to another stream. Low levels of cognitive parasocial interactions indicate that viewers do not feel that the virtual host shares their interests and beliefs, or the host does not meaningfully influence them. This can lead to reduced intellectual engagement and interest in the content, a lack of perception of the host as an authoritative source of information,

and a reduced likelihood that viewers will follow the host's recommendations and advice. Low levels of behavioural parasocial interactions means that viewers do not actively engage with the virtual host through comments, donations or other forms of participation, nor do they seek to support the host or participate in its events. This can lead to a decrease in audience activity and engagement, a decrease in the number of interactions (comments, donations), which affects the financial support of the stream, and a decrease in the overall atmosphere and energy of the stream.

Low levels of parasocial interactions indicate a need for improvement in the approach to virtual host streaming. Analysing the reasons for low performance and implementing recommended improvements will help increase audience engagement, satisfaction, and loyalty.

The sixth block is aimed at assessing the quality and effectiveness of the content of a virtual host stream. In order to comprehensively assess the quality and effectiveness of the virtual host stream content, a methodology is proposed that includes the following key parameters: content relevance, informativeness, entertainment value, interactivity, and viewer engagement. Each aspect will be evaluated on 5 questions using a Likert scale (from 1 to 5, where 1 is the lowest, negative score and 5 is the highest, positive score) (Table 11).

Table 11. Questionnaire for assessing content quality

No.	Questions	Answers
Content relevance		
1	How well does the content of the stream meet your expectations?	
2	How much of the stream's content is relevant to your interests?	
3	How relevant to you is the stream topic under discussion?	
4	How important to you is the content presented in the stream?	
5	How useful is stream content to your daily life?	
Informativeness		
6	How useful was the information provided?	
7	How in-depth were the topics discussed?	
8	How clear and understandable was the information presented?	

Continued Table 11.

No.	Questions	Answers
Informativeness		
9	How much does a virtual host help you learn new things?	
10	How much do you trust the information provided by the virtual host?	
Entertainment value		
11	How interesting was the content of the stream?	
12	How much did you enjoy your time on the streamer?	
13	How much does a virtual host make streaming fun and engaging?	
14	How much did you enjoy watching the stream?	
15	How interested are you in going back to stream this virtual host?	
Interactivity		
16	How often do you interact with the virtual host while streaming?	
17	How responsive is the virtual host to your comments and questions?	
18	How interested are you in participating in the interactive elements of the stream (polls, games, etc.)?	
19	How important is it to you that the stream be interactive?	
20	How satisfied are you with the level of interactivity on the streamer?	
Audience engagement		
21	How involved were you in the stream?	
22	How actively did you interact with the content of the stream?	
23	How often did you comment or ask questions during the stream?	
24	How interested are you in participating in discussions related to streaming?	
25	How willing would you be to recommend this stream to others?	

Source: created by the authors

To obtain the result, the average score for each parameter will need to be calculated based on the respondents' answers. The average score for each parameter is calculated as the arithmetic mean of the scores for the corresponding questions. Interpretation of the results provides the possibility of obtaining a very low level of quality and efficiency (1-1.9), low level (2-2.9), medium level (3-3.9), high level (4-4.5) and very high level of quality and efficiency (4.6-5). In order to make an overall assessment of the quality and efficiency of live-streaming with a virtual host based on the data obtained, it is necessary to aggregate the results for each block into a single assessment. To do this, it is necessary to determine how relevant each block is to the overall assessment. For example, viewer self-efficacy may be more essential than technical quality. The weights can be set as a percentage of the overall score (100% total).

Calculated parameters: technical quality of the stream (results of the first block of evaluation); technical aspects and features of the platform on which the broadcast with the virtual host is conducted (results of the second block of evaluation); evaluation of the virtual host (results of the fourth block of evaluation), calculated taking into account the indicators of the third block of evaluation (types of viewers, their preferences, peculiarities of their perception and the presence of factors that distort the evaluation, such as, for example, information overload, the presence of negative stereotypes about virtual people, etc.). Once all items have been given a weight, it is worth calculating the weighted scores for each block (to do this, the average score of each block is

multiplied by the corresponding weight) and adding up all the weighted scores to get a total score. Interpretation of the overall score includes the possibility of very low quality and efficiency (1-1.9), low quality and efficiency (2-2.9), medium quality and efficiency (3-3.9), high quality and efficiency (4-4.5), and very high quality and efficiency (4.6-5). In this way, it is possible not only to calculate the quality and efficiency of the stream, but also identify the most problematic aspects that affect this indicator.

Discussion

The material analysed in this study showed numerous relationships between the effectiveness of live broadcasting and various parameters. The research conducted within the framework of this article confirms the conclusions given in the article by A.A. Laghari *et al.* (2023) regarding the fact that technological aspects of video broadcasting (such as video streaming, 2D and 3D formats, the use of certain protocols for streaming, certain video compression technologies, and so on) can have a significant impact on the overall perception and evaluation of the stream by viewers. The same opinion is held by U. Sharma *et al.* (2024), who empirically proved a direct correlation between the quality and progressiveness of broadcasting technologies and viewers' satisfaction (by 20%), their desire to watch the whole stream from beginning to end (by 32%) and their desire to participate as a viewer in the next stream of the same host (by 17%). These points have been taken into account when compiling the methodology for assessing the effectiveness and quality of live-streaming using virtual streaming.

This study also revealed a direct relationship between the presenter's realism (primarily the display of six emotions on his face: happiness, sadness, surprise, anger, fear, and disgust) and the effectiveness of interaction with viewers, stimulating their consumer behaviour after watching live broadcasting, which was also pointed out in this study, which is consistent with the data of N. Bharadwaj *et al.* (2022). The authors point out the mandatory presence of the element of emotionality of the presenter, and also measure the difference between his presence in the frame and absence (taking into account the emotionality of the voice sound), which overlaps with the conclusions formulated in this study and is reflected in the developed methodology for assessing the effectiveness and quality of live broadcasting with the use of a presenter.

The present study examines the use of physical models and the impact of recreating physical space in virtual space – including for the purpose of creating a believability and realism effect (which may also apply to the host who is broadcasting with such a background) – in the context of the importance of the realism and believability of the virtual host and the positive, directly proportional impact of this realism on audience satisfaction with the content, increased engagement and willingness to interact with the virtual host, desire to perform actions provoked by the host (participate in interactives, subscribe to social networks, buy the product advertised by the host, and so on), which is directly related to the effectiveness of live broadcasting. This aspect was also reflected in the created methodology for assessing the quality and effectiveness of live broadcasts. The same opinion was held by M. Li & S. Wenjie (2021).

The results of the study also proved that realistic (bright, visually pleasing) visual effect and interactivity of live broadcasting have a tangible positive impact on consumers' willingness to participate in interactives, make recommended purchases, and follow the host's advice (which is reflected in the methodology for assessing the quality and effectiveness of live broadcasting with a virtual host created in this study). The findings are consistent with the results of a stimulus-organism-response theory-based study by C. Ye *et al.* (2022), who considered as an object of research consumers of live broadcasting tourism and came to the same conclusion.

The findings of this study indicate the success of using virtual influencers in the marketing environment, and these findings were reasonably confirmed based on an empirical study conducted by J. Looi & L.A. Kahlor (2024). The authors also complement the data of the study conducted in this article with the results of modelling the topics of the latent Dirichlet distribution, which pointed out another aspect of the perception of virtual hosts that differed from real ones by first emphasizing their identity and only then engaging in self-promotion, which is worth considering in the next studies on this topic. Furthermore, the article by J. Looi & L.A. Kahlor

confirmed the findings of this study about the relationship between the characteristics of the live-streaming platform and the effectiveness of live-streaming – the authors empirically proved that the level of influence directly depended on Instagram platform validation and significantly influenced the trust in the Influencer and audience engagement.

This study was also based on the article by L. Hofeditz *et al.* (2022), which described the results of the study of the difference between the perception of real and virtual Influencers and trust in them. Within the framework of this study, what is interesting is not the conclusions reached by the authors about the preference for human influencers, but the evaluation methodology and inferences concerning the parameters of perception evaluation and the level of trust in such presenters, which confirm the correctness of including these parameters in the criteria for evaluating the effectiveness and quality of live broadcasting with virtual hosts.

When compiling the methodology for assessing the effectiveness and quality of broadcasts, the motivation of viewers was also taken into account as one of the crucial and influential aspects of the specifics of the audience's perception of the broadcast and its presenter. These inferences are confirmed by the data of the article by M.A. Camilleri & L. Falzon (2021), which analyses the importance of stream viewers' motivation, which also strongly influences the final evaluation of its quality and effectiveness. However, the metrics used by the authors may well be compensated by the metrics of viewer types used in this study (which is also related to the manifestations of their motivation). In addition, this study proves that based on motivation alone it is impossible to get a sufficiently diverse and complete picture of how the stream will be perceived and evaluated by the audience, because a number of fundamental parameters (such as, for example, the technical quality of the live broadcast, the quality of the broadcasted information, the realism, and authenticity of the virtual presenter, and so on) have been missed.

In the context of this study, it is also worth mentioning the paper by H. Wu *et al.* (2023), who emphasized the importance of combining technical and aesthetic aspects when evaluating live broadcasts, fully supporting the findings that live broadcasts (or streams) should be evaluated in a complex set of different parameters and characteristics, both purely technical (e.g., site parameters or video and audio quality) and aesthetic (e.g., visual attractiveness and realism of the host, tonality of the host's voice). However, the Disentangled Objective Video Quality Evaluator (DOVER) and DOVER++ (an approach that provides clear quality assessments from a single aesthetic or technical point of view) methods proposed by the authors can still be assessed as not quite complete and significantly inferior to the six-block multidimensional evaluation developed in this study, which includes not only output data (such as video

quality, virtual host realism, information quality, and so on), but also output data (audience parameters, their motivation, and motivation).

The results of the study showed that in order to achieve a high level of quality, efficiency, and effectiveness of live broadcasts with virtual hosts and influencers, many factors need to be taken into account. Technological aspects, the realism, and believability of the hosts, their emotional expressiveness and interactivity are important. It is also necessary to consider the experience and characteristics of the audience, which can increase the perception of information, engagement, and desire to act both within the stream (to participate in interactives, communicate with the host) and outside of it (buy recommended products, leave reactions, popularize the host or content).

Conclusions

The methodology constructed in this study took into account numerous relevant studies dealing with different aspects of video broadcast evaluation, including those using virtual hosts.

Technological aspects of video broadcasting such as video streaming, 2D and 3D formats, use of specific protocols for streaming and video compression technologies were considered critical. High-quality video and audio, as well as the absence of technical glitches, significantly increase viewer satisfaction and engagement with the content. These parameters play a key role in viewers' perception and evaluation of the stream.

The emotional interaction of the presenter with the audience also proved to be an essential factor. The realism and authenticity of the virtual presenter, his/her ability to express emotions and respond to viewers' actions contribute to deeper interaction and increase the level of trust and engagement of the audience. Emotional expressiveness and consistency of the presenter's behaviour have a positive impact on the interaction with viewers, which stimulates their activity and participation in the interactions. Parameters of interaction with the platform and technical peculiarities were also considered. Network performance monitoring, video and audio quality analysis, testing on different devices and

platforms – all this helps to ensure high quality of broadcasting and minimize technical issues that can negatively affect the stream experience. The use of various technical solutions to optimize video and audio quality, as well as to ensure broadcast stability, plays a major role in increasing viewer satisfaction.

Methods for assessing different types of viewers and their preferences have been developed. Understanding the specific needs and preferences of each group of viewers allows for a more accurate assessment of stream quality and effectiveness, as well as for tailoring content to different audiences. Assessing the sense of community, emotional support, interactivity and social presence allows for a more accurate assessment of viewer engagement and satisfaction. In addition, the parameters of viewers' self-efficacy, information overload, service overload, user dependency and cognitive dissonance were included in the methodology. These parameters provide a deeper understanding of the viewers' psychological state and their perception of the stream, which helps to improve the overall effectiveness of the broadcast. The evaluation of these parameters provides an opportunity to identify potential problems and propose solutions to address them.

Limitations of the study include the limited data used and the subjectivity of viewers' perceptions, which may affect the objectivity of the evaluations. Future research needs to be more extensive, using different platforms and technologies, and to take into account cultural and regional differences in perceptions of virtual presenters. Key areas for further research include improving methods for assessing emotional interaction, adapting technologies for different types of viewers, and developing new tools for analysing and monitoring the quality of live broadcasts. This will not only improve the accuracy and objectivity of assessments, but also improve the quality and efficiency of live broadcasts with virtual hosts.

Acknowledgements

None.

Conflict of Interest

None.

References

- [1] Akramullah, S. (2014). *Digital video concepts, methods, and metrics: Quality, compression, performance, and power trade-off analysis*. Berkeley: Springer. doi: 10.1007/978-1-4302-6713-3.
- [2] Andersson, V., & Sobek, T. (2020). *Virtual avatars, virtual influencers & authenticity*. Retrieved from <https://gupea.ub.gu.se/handle/2077/64928>.
- [3] Bharadwaj, N., Ballings, M., Naik, P.A., Moore, M., & Arat, M.M. (2022). A new livestream retail analytics framework to assess the sales impact of emotional displays. *Journal of Marketing*, 86(1), 27-47. doi: 10.1177/00222429211013042.
- [4] Brown, S.M. (2020). *Let's get virtual: Measuring virtual influencer's endorser effectiveness*. Retrieved from <https://oaktrust.library.tamu.edu/handle/1969.1/192198>.
- [5] Camilleri, M.A., & Falzon, L. (2021). Understanding motivations to use online streaming services: Integrating the technology acceptance model (TAM) and the uses and gratifications theory (UGT). *Spanish Journal of Marketing*, 25(2), 217-238. doi: 10.1108/SJME-04-2020-0074.

- [6] Chen, C.Y., & Lin, S.S. (2018). What drives live-stream usage intention? The perspectives of flow, entertainment, social interaction, and endorsement. *Telematics and Informatics*, 35(1), 293-303. doi: [10.1016/j.tele.2017.12.003](https://doi.org/10.1016/j.tele.2017.12.003).
- [7] Chen, H.-C., Wang, C.-C., Hung, J.C., & Hsueh, C.-Y. (2022). Employing eye tracking to study visual attention to live streaming: A case study of Facebook live. *Sustainability*, 14(12), article number 7494. doi: [10.3390/su14127494](https://doi.org/10.3390/su14127494).
- [8] Chen, J., & Liao, J. (2022). Antecedents of viewers' live streaming watching: A perspective of social presence theory. *Frontiers in Psychology*, 13, article number 839629. doi: [10.3389/fpsyg.2022.839629](https://doi.org/10.3389/fpsyg.2022.839629).
- [9] Chiou, E.K., Schroeder, N.L., & Craig, S.D. (2020). How we trust, perceive, and learn from virtual humans: The influence of voice quality. *Computers & Education*, 146, article number 103756. doi: [10.1016/j.compedu.2019.103756](https://doi.org/10.1016/j.compedu.2019.103756).
- [10] Gefen, D., & Straub, D.W. (2004). Consumer trust in B2C e-Commerce and the importance of social presence: Experiments in e-Products and e-Services. *Omega*, 32(6), 407-424. doi: [10.1016/j.omega.2004.01.006](https://doi.org/10.1016/j.omega.2004.01.006).
- [11] Gerlich, M. (2023). The power of virtual influencers: Impact on consumer behaviour and attitudes in the age of AI. *Administrative Sciences*, 13(8), article number 178. doi: [10.3390/admsci13080178](https://doi.org/10.3390/admsci13080178).
- [12] Hofeditz, L., Nissen, A., Schütte, R., & Mirbabaie, M. (2022). *Trust me, I'm an influencer! – A comparison of perceived trust in human and virtual influencers*. Retrieved from https://aisel.aisnet.org/ecis2022_rip/27.
- [13] Kim, D., & Jo, D. (2022). Effects on co-presence of a virtual human: A comparison of display and interaction types. *Electronics*, 11(3), article number 367. doi: [10.3390/electronics11030367](https://doi.org/10.3390/electronics11030367).
- [14] Laghari, A.A., Shahid, S., Yadav, R., Karim, S., Khan, A., Li, H., & Shoulin, Y. (2023). The state of art and review on video streaming. *Journal of High-Speed Networks*, 29(3), 211-236. doi: [10.3233/JHS-222087](https://doi.org/10.3233/JHS-222087).
- [15] Li, M., & Wenjie, S. (2021). Application of virtual reality technology and digital twin in digital media communication. *Journal of Intelligent & Fuzzy Systems*, 40(4), 6655-6667. doi: [10.3233/JIFS-189501](https://doi.org/10.3233/JIFS-189501).
- [16] Looi, J., & Kahlor, L.A. (2024). Artificial intelligence in influencer marketing: A mixed-method comparison of human and virtual influencers on Instagram. *Journal of Interactive Advertising*, 24(2), 107-126. doi: [10.1080/15252019.2024.2313721](https://doi.org/10.1080/15252019.2024.2313721).
- [17] Lv, J., Cao, C., Xu, Q., Ni, L., Shao, X., & Shi, Y. (2022). How live streaming interactions and their visual stimuli affect users' sustained engagement behaviour – a comparative experiment using live and virtual live streaming. *Sustainability*, 14(14), article number 8907. doi: [10.3390/su14148907](https://doi.org/10.3390/su14148907).
- [18] Min, X., Zhai, G., Zhou, J., Farias, M.C., & Bovik, A.C. (2020). Study of subjective and objective quality assessment of audio-visual signals. *IEEE Transactions on Image Processing*, 29, 6054-6068. doi: [10.1109/TIP.2020.2988148](https://doi.org/10.1109/TIP.2020.2988148).
- [19] Moustakas, E., Lamba, N., Mahmoud, D., & Ranganathan, C. (2020). Blurring lines between fiction and reality: Perspectives of experts on marketing effectiveness of virtual influencers. In *International conference on cyber security and protection of digital services (cyber security)* (pp. 1-6). Dublin: IEEE. doi: [10.1109/CyberSecurity49315.2020.9138861](https://doi.org/10.1109/CyberSecurity49315.2020.9138861).
- [20] Nasir, M. (2015). *The role of CRM in marketing*. Retrieved from <http://surl.li/dldvjd>.
- [21] Park, S., & Catrambone, R. (2021). Social responses to virtual humans: The effect of human-like characteristics. *Applied Sciences*, 11(16), article number 7214. doi: [10.3390/app11167214](https://doi.org/10.3390/app11167214).
- [22] Schuck, P., Altmeyer, M., Krüger, A., & Lessel, P. (2022). Viewer types in game live streams: Questionnaire development and validation. *User Modeling and User-Adapted Interaction*, 32, 417-467. doi: [10.1007/s11257-022-09328-9](https://doi.org/10.1007/s11257-022-09328-9).
- [23] Sharma, U., Malviya, A., & Shree, R. (2024). Exploring the role of edge computing in optimizing broadcast technologies. In *Proceedings of the 13th international conference on communication systems and network technologies* (pp. 117-126). Jabalpur: IEEE. doi: [10.1109/CSNT60213.2024.10546077](https://doi.org/10.1109/CSNT60213.2024.10546077).
- [24] Sjöblom, M., & Hamari, J. (2017). Why do people watch others play video games? An empirical study on the motivations of Twitch users. *Computers in Human Behavior*, 75, 985-996. doi: [10.1016/j.chb.2016.10.019](https://doi.org/10.1016/j.chb.2016.10.019).
- [25] Song, S.W., & Shin, M. (2024). Uncanny valley effects on chatbot trust, purchase intention, and adoption intention in the context of e-commerce: The moderating role of avatar familiarity. *International Journal of Human-Computer Interaction*, 40(2), 441-456. doi: [10.1080/10447318.2022.2121038](https://doi.org/10.1080/10447318.2022.2121038).
- [26] Tu, Z., Wang, Y., Birkbeck, N., Adsumilli, B., & Bovik, A.C. (2021). UGC-VQA: Benchmarking blind video quality assessment for user generated content. *IEEE Transactions on Image Processing*, 30, 4449-4464. doi: [10.1109/TIP.2021.3072221](https://doi.org/10.1109/TIP.2021.3072221).
- [27] Wu, H., Zhang, E., Liao, L., Chen, C., Hou, J., Wang, A., Sun, W., Yan, Q., & Lin, W. (2023). Exploring video quality assessment on user generated contents from aesthetic and technical perspectives. In *Proceedings of the IEEE/CVF international conference on computer vision (ICCV)* (pp. 20144-20154). London: IEEE. doi: [10.48550/arXiv.2211.04894](https://doi.org/10.48550/arXiv.2211.04894).
- [28] Ye, C., Zheng, R., & Li, L. (2022). The effect of visual and interactive features of tourism live streaming on tourism consumers' willingness to participate. *Asia Pacific Journal of Tourism Research*, 27(5), 506-525. doi: [10.1080/10941665.2022.2091940](https://doi.org/10.1080/10941665.2022.2091940).

- [29] Zhang, M., Sun, L., Qin, F., & Wang, G.A. (2021). E-service quality on live streaming platforms: Swift guanxi perspective. *Journal of Services Marketing*, 35(3), 312-324. doi: 10.1108/JSM-01-2020-0009.
- [30] Zhang, S., & Pan, Y. (2023). Mind over matter: Examining the role of cognitive dissonance and self-efficacy in discontinuous usage intentions on pan-entertainment mobile live broadcast platforms. *Behavioral Sciences*, 13(3), article number 254. doi: 10.3390/bs13030254.
- [31] Zhang, Y., Wang, X., & Zhao, X. (2023). Supervising or assisting? The influence of virtual anchor driven by AI-human collaboration on customer engagement in live streaming e-commerce. *Electronic Commerce Research*. doi: 10.1007/s10660-023-09783-5.

Розробка нових методів оцінки якості та ефективності прямих ефірів з використанням цифрових людських технологій

Сі Чен

Доктор філософії, науковий співробітник
Чіангмайський університет
50200, шосе Хуай Кео, 239, м. Чіангмай, Таїланд
<https://orcid.org/0009-0009-3589-6330>

Шива Шанкар Рамасамі

Доктор філософії, викладач
Чіангмайський університет
50200, шосе Хуай Кео, 239, м. Чіангмай, Таїланд
<https://orcid.org/0000-0002-6160-5949>

Бібі Ше

Доктор філософії, науковий співробітник
Чіангмайський університет
50200, шосе Хуай Кео, 239, м. Чіангмай, Таїланд
<https://orcid.org/0000-0002-2451-1724>

Піячат Удомвонг

Доктор філософії, науковий співробітник
Чіангмайський університет
50200, шосе Хуай Кео, 239, м. Чіангмай, Таїланд
<https://orcid.org/0000-0002-3915-6411>

Анотація. Метою цього дослідження було створення нової, комплексної методології оцінки якості та продуктивності відеотрансляцій з використанням технологій віртуальної людини. Методологія дослідження включала аналіз існуючих методологій та їх адаптацію до специфіки віртуальних хостів. Було розроблено нові інструменти оцінювання, що враховують такі параметри, як технічна якість, емоційна підтримка, інтерактивність, соціальна присутність, привабливість стримера та намір продовжити перегляд. Основні результати дослідження показали, що технологічні аспекти потокового відео мають значний вплив на сприйняття глядачами таких відео. Висока якість відео та аудіо, стабільність трансляції підвищують задоволеність та залученість аудиторії. Крім того, емоційна взаємодія між віртуальним ведучим та аудиторією сприяє глибшому взаєморозумінню та підвищує довіру. Інтерактивність і соціальна присутність віртуального ведучого створюють відчуття спільності та залученості, що позитивно впливає на загальне сприйняття трансляції. Також було досліджено фактори глядацької самоефективності, інформаційного перевантаження та когнітивного дисонансу, що допомагає краще зрозуміти психологічний стан глядачів. Отримані результати свідчать про те, що для досягнення високого рівня достовірності та довіри до віртуальних інфлюенсерів необхідно враховувати технологічні аспекти, естетичні аспекти, рівень довіри до ведучого, параметри його аудиторії (її мотивації, культурні та особистісні характеристики, які можуть впливати на специфіку оцінювання якості та ефективності трансляції), параметри самого ведучого (реалістичність, емоційна виразність, інтерактивність, наявність та відсутність гумору тощо). Запропонована методика дозволяє комплексно оцінити всі ці параметри, сприяючи підвищенню якості та ефективності прямих ефірів з віртуальними ведучими.

Ключові слова: віртуальний аватар; хост; стрімінг; сприйняття; метрики

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

**Том 9, № 2
2024**

Редагування англomовних текстів:
С. Воровський

Відповідальні редактори:
А. Тарасенко
А. Зленко

Комп'ютерна верстка:
О. Глінченко

Підписано до друку 28 червня, 2024
Ум. друк. арк. 11,8
Тираж 100 прим.

Видавець:
Університет Григорія Сковороди в Переяславі
08401, вул. Сухомлинського, 30, м. Переяслав, Україна
Тел.: +38 (044) 293 11 22
E-mail: info@sdс-journal.com.ua
<https://sdс-journal.com.ua/uk>

Journal
“Society. Document. Communication”

Volume 9, No. 2
2024

Editing English-Language Texts:
S. Vorovsky

Managing Editors:
A. Tarasenko
A. Zlenko

Desktop Publishing:
O. Glinchenko

Signed to the print of June 28, 2024
Conventional Printed Sheet 11.8
Circulation 100 copies

Publisher:
Hryhorii Skovoroda University in Pereiaslav
08401, 30 Sukhomlynskyi Str., Pereiaslav, Ukraine
Tel.: +38 (044) 293 11 22
E-mail: info@sdic-journal.com.ua
<https://sdic-journal.com.ua/en>