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Implementation of electronic document management in the occupational safety management system: Modern approaches to the training of future professional education specialists

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Abstract. The management processes digitalisation is essential for improving the efficiency of professional activities in various fields, including occupational health and safety. The introduction of electronic document management (EDM) in the occupational health and safety management system facilitates the optimisation of document flow, increases the level of information security, reduces the influence of the human factor and ensures continuous monitoring of compliance with legal requirements. The purpose of the study concerned analysing the possibilities of implementing electronic document management in the field of occupational health and safety and vocational education, identifying key digital tools for its implementation, and assessing their impact on the efficiency of management processes. For achieving this goal, a set of complementary research methods was used: theoretical analysis, synthesis and generalisation of scientific sources, educational and methodological and regulatory and legal documentation; modeling of the digital technologies integration into curricula; empirical methods (educational programs analysis, teachers' pedagogical activities observation) to assess the peculiarities of EDM implementation in the training of future vocational education specialists. The study examined modern digital technologies and software solutions for document management automation that can be integrated into the educational process. The key advantages of using EDM are identified, including: increasing the efficiency of document flow, reducing the cost of paper resources, ensuring data availability, improving control over compliance with regulatory requirements and minimizing the risks of information threats. The author substantiated the need to update educational programs through the introduction of training modules covering both the technical aspects of working with digital platforms and the legal basis of electronic document management. The prospects for further improvement of the educational process by integrating digital competencies into the training of future vocational teachers (occupational safety and health) are substantiated. The results of the study can be used to modernise educational programs, train specialists in occupational safety and health, optimise management processes in educational institutions and improve the efficiency of documentary support for professional activities

Keywords: digital document science; management process automation; information security; remote administration; educational digital resources; document flow optimisation

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Introduction

Modern digitalisation requires management processes modernisation in all areas of activity, including occupational health and safety. Traditional approaches to documenting and monitoring compliance with regulatory requirements are often ineffective due to the large volume of paperwork, the complexity of its processing and storage, and the risks of data loss or distortion. The use of electronic document management (EDM) allows you to optimise management processes, increase information security, and ensure continuous monitoring of compliance with legal requirements. Furthermore, there is a growing need to train vocational education specialists who have modern digital tools and competencies necessary for the effective implementation of EDM in the occupational health and safety management system. This requires changes in educational programs, the inclusion of practical cases on the use of EDM and the development of professional competencies.

Many scholars have been engaged in research in the field of document management digitalisation. E.L. Baturin *et al.* (2020) considered information technology in electronic document management and emphasised the importance of using electronic keys to identify users and increase data security. O.M. Anisimova (2020) analysed the culture of documents preparation and processing, focusing on the need to standardise digital processes in document management. Particular attention was paid to the formation of employees' digital competence, which includes not only technical skills, but also knowledge of regulatory requirements, business communication ethics and information security rules. O.M. Anisimova (2020) also emphasised the role of document culture in ensuring the management processes quality in the digital environment.

Ye. Goncharenko (2023) researched modern models of development and implementation of EDM systems, noting their effectiveness in simplifying administrative procedures. The author emphasised the importance of proper integration of such systems into business processes and technologies that increase the document management efficiency. It is important for occupational health and safety management, as such systems can optimise workflow and reduce time and resources spent on processing safety-related documents.

Aspects of the EDM application in the field of occupational health and safety were considered by I.V. Hoshovska (2023), who emphasised the relevance of automating management processes to reduce risks and improve safety monitoring at enterprises. Similar conclusions are drawn by K.V. Khizhnyak (2024), highlighting the importance of regulatory support for the introduction of EDM in the occupational safety and health management system. T. Korolyuk & N. Rapa (2021) analysed the advantages and disadvantages of document management digitalisation, paying attention to the legislative aspects and the effectiveness of such systems implementation in

various fields of activity. G.P. Lukash (2020) studied the concept of a document in document science and noted the multiparadigm approach to defining its essence, which is relevant in the context of digital transformations. G.P. Lukash (2020) focuses on the concept of document evolution in the digitalisation context, when the traditional material form gives way to virtual media, which does not reduce, but rather complicates its analysis. The author also draws attention to institutional and technological changes that force to revise the basic theoretical provisions of document studies.

The study of the relevance of electronic document management in the occupational health and safety management system is important and timely, since it not only contributes to improving the efficiency of production processes but also forms a new level of training for future specialists in this field. The purpose of the article is to substantiate the need to introduce electronic document management into the occupational health and safety management system and the process of training future vocational teachers (occupational health and safety), to identify its key advantages, modern software solutions and prospects for application.

For achieving this goal, the following tasks are envisaged: to study the current state of electronic document management implementation in the occupational health and safety management system in Ukraine, as well as to analyse modern EDM software; to develop methodological recommendations for integrating electronic document management into educational programs for training vocational teachers (occupational health and safety), as well as to identify the main challenges and prospects for its implementation; to propose a model for implementing electronic document management in the occupational health and safety management system.

The research scientific novelty consists in an integrated approach to the study of the electronic document management system implementation in the occupational health and safety management system with an emphasis on its integration into the process of training future vocational teachers (occupational health and safety).

Materials and Methods

The research used a set of theoretical and empirical methods that allow to comprehensively reveal the problem of introducing electronic document management into the occupational safety and health management system and the educational process. Methods of scientific cognition: theoretical analysis – study of scientific, methodological and normative legal sources to determine the essence of electronic document management, its importance in modern management and educational activities; comparative analysis – study of the digitalisation of document management experience in Ukraine in order to identify best practices and opportunities for their adaptation; analysis of normative legal acts – consideration

of the current legislative framework governing the introduction of electronic document management; content analysis – research of information resources, reports, and publications on electronic document management.

Empirical methods: direct and indirect observation – analysis of the practice of implementing electronic document management in educational institutions and enterprises; review of modern information systems – analysis of available software solutions for electronic document management, including M.E.Doc, Vchasno, Document.Online, Microsoft SharePoint, Google Workspace, etc. (Electronic document management, n.d.); analysis of teachers' pedagogical activities – study of future specialists' training methods, the level of digital technologies integration into the educational process.

The actual material of the study was based on the legal acts of Ukraine, namely: Law of Ukraine No. 851-IV "On Electronic Documents and Electronic Documents Circulation" (2003) – articles on the definition of an electronic document, its legal status and storage requirements were analysed; Law of Ukraine No. 2155-VIII "On Electronic Trust Services" (2017) – provisions on electronic signatures and certification centers were considered; Order of the Ministry of Justice of Ukraine No. 1886/5 (2014) – examined the requirements for electronic document management in organisations; Resolution of the Cabinet of Ministers of Ukraine No. 55 (2018) – studied the requirements for electronic interagency exchange; Order of the Ministry of Economy of Ukraine No. 839-21 (2021) – analysed the provisions on the use of digital solutions in the field of occupational health and safety.

The article presents an analysis of the educational and professional program "Vocational Education (Occupational Health and Safety)" of the first (bachelor's) level of higher education in the specialty 015 Vocational Education (Occupational Health and Safety) of the field of knowledge 01 Education / Pedagogy. (2024) (Educational and Professional Program ..., 2024) at the Hryhorii Skovoroda University in Pereiaslav and the Standard of Higher Education, first (bachelor's) level, 015 "Vocational Education (by specialisations)" (Order of the Ministry of Education and Science of Ukraine No. 1460, 2019).

This paper considered scientific research and publications that provide practical recommendations for the implementation of electronic document management in occupational safety and health management systems (State labor service of Ukraine, 2024), elaborates on modern models and methods of creating and implementing EDM (Goncharenko, 2023), provides an analysis of the problems and prospects of electronic document management in the field of occupational safety and health (Hoshovska, 2023), examined the features of the functioning of electronic document management systems in the field of occupational safety (Khizhnyak, 2023), studied practical advice on the implementation of EDM in the occupational safety management system (Khizhnyak, 2024) and analysed

the benefits of EDM in occupational safety management (What are the benefits... 2023).

Results and Discussion

The electronic document management system in the field of occupational safety and health is a technological document management system based on digital information technologies and automated data processing. Its implementation helps to improve the efficiency of management decisions, ensure the transparency of production processes and create a safe working environment. In the context of training future vocational education specialists, EDM is an important element in the formation of their digital competencies necessary to work in the modern technological environment.

The digitalisation of occupational health and safety management using EDM provides: optimisation of documentary support for the occupational health and safety process, which allows to reduce the volume of paper documents, reduce the cost of their administration and accelerate information exchange between the subjects of supervisory activities; prompt access to the regulatory framework, which allows specialists and officials to quickly receive the necessary instructions, orders and protocols in electronic form; control and reporting processes automation, which contributes to timely monitoring of occupational safety, risk identification and reasonable management decisions; increasing the level of information security through the use of digital signatures, cryptographic protection and automated document access control systems (Hoshovska, 2023; What are the benefits..., 2023).

A key aspect of integrating EDM into the educational process is to prepare future professionals to work in a digital document environment (Semenenko, 2024). This implies mastering the skills of working with modern document management systems, knowledge of regulatory requirements for EDM in the field of occupational safety and health, as well as the ability to analyse and use information in digital formats to ensure the effective functioning of the occupational safety and health system at enterprises. Consequently, the introduction of electronic document management not only optimises occupational health and safety management at enterprises, but also requires appropriate changes in the vocational education system aimed at training specialists who are proficient in modern information technologies and are able to apply them in the field of occupational safety.

The main advantages of implementing electronic document management in the occupational health and safety management system and its role in training future vocational education specialists

Scientific papers analysis (Hoshovska, 2023; Kamen-ska *et al.*, 2023; Baturin *et al.*, 2020), studies on the benefits of electronic document management in the occupational safety management system – What are

the benefits of electronic document management in the occupational safety management system? (2023), as well as regulatory documents – State labor service of Ukraine (2024); Order of the Ministry of Justice of Ukraine No. 1886/5 (2014); Resolution of the Cabinet of Ministers of Ukraine No. 55 (2018); Order of the Ministry of Economy of Ukraine No. 839-21 (2021), etc. leads to the conclusion that the introduction of EDM into the occupational safety management system is an important step in the digital transformation of production and educational processes. It helps to increase the efficiency of administration, minimise paperwork and optimise information flows. In addition, the integration of EDM into the educational process forms the digital competencies of future vocational education specialists, which is a key aspect of their professional training.

Within the educational component “Supervisory Activity Organisation in the Field of Occupational Safety and Health”, it is of particular importance that future specialists master the skills of using electronic document management. This ensures the training of competitive specialists who are able to work in the context of digital transformation and effectively apply modern information technologies in their professional activities (Kamenska, 2023).

The EDM integration into the educational process would help students develop a number of important competencies. In particular, they would be able to effectively use modern information technologies and specialised software to automate occupational health and safety management processes, which would facilitate their integration into the educational environment of vocational education. At the same time, students would be able to apply appropriate software to solve tasks in the field of occupational safety and health according to the requirements of professional activity and specialisation. Considerable attention would be paid to the development of skills to carry out professional activities in compliance with the requirements of occupational health and safety legislation, educational standards and internal regulations of the educational institution. Students would also learn methods of organizing work in the context of digitalisation, taking into account the requirements of environmental safety, life safety, occupational health and safety (Order of the Ministry of Education and Science of Ukraine No. 1460, 2019). In addition, future specialists would acquire competencies in the field of digital document management technologies, analysis and use of regulatory documents in digital format. Mastering the skills of working with electronic signatures, digital registers and automated security control systems would be an important part of their training. At the same time, it would also become important to understand the modern requirements for the digitalisation of management processes in the field of occupational safety and health, which would help to improve their professional training and meet the current challenges of their professional activities.

Meanwhile, despite the considerable attention of researchers to the issues of document management digitalisation and management process automation, the aspects of EDM integration into the training of future vocational teachers (occupational health and safety) are not sufficiently considered. This necessitates a thorough analysis of modern digital technologies and their impact on the development of relevant competencies in future teachers. The introduction of EDM into the educational process is therefore an important step in the training of specialists who are able to work in the context of digital transformation and effectively use modern information technologies in their professional activities.

The authors identify the main advantages and challenges associated with the implementation of EDM in this area:

- ✓ optimisation of document flow and reduction of time for processing documents – the EDM implementation can significantly reduce the time for creating, approving, transferring and archiving documents. For example, while traditional document flow can take several hours or days, when using an EDM, the transfer of documents between structural units is instantaneous. This is especially important for rapid response to emergencies, reporting on occupational safety, and monitoring the implementation of instructions (Hoshovska, 2023; Khizhnyak, 2024);
- ✓ convenience, mobility and remote work – digital EDM platforms provide access to documentation from any geographical location, which greatly simplifies occupational health and safety management in the context of decentralised work of enterprises or educational institutions. In addition, this is an important factor in the context of pandemics, military operations and other emergencies when it is necessary to quickly adapt to new operating conditions (Khizhnyak, 2023; State labor service of Ukraine, 2024);
- ✓ resource saving and material cost reduction – the transition to EDM can significantly reduce the cost of paper, print cartridges, archival storage and physical delivery of documents. It is estimated that about 60% of paper copies of documents lose their relevance within one business day. The use of digital technologies reduces the amount of unnecessary printed materials, contributing to the environmental sustainability of an enterprise or institution (The future of occupational safety..., 2023; What are the benefits..., 2023);
- ✓ increasing the level of control over compliance with occupational health and safety standards – digital EDM platforms provide automated monitoring of changes in regulations, control over the implementation of occupational health and safety measures, preservation of the history of changes made, and centralised access to the necessary documentation. This allows managers to quickly assess the current state of the occupational health and safety system and respond to violations in a timely manner (Order of the Ministry of Economy of Ukraine No. 839-21, 2021; Khizhnyak, 2023);

✓ routine processes automation and increased management efficiency – the use of modern EDM systems allows automating a number of administrative processes, including the approval of internal documentation, maintaining electronic briefing logs, managing personnel certification and organizing internal audits. This significantly reduces the risks associated with the human factor and ensures the continuity of occupational health and safety management processes (Kamenska *et al.*, 2023; What are the benefits..., 2023);

✓ reliability and security of document storage – electronic documents are stored on secure servers using modern cryptographic encryption methods. This guarantees protection against unauthorised access, loss or damage to documents. In addition, all operations with documents can be tracked through audit systems, which ensures high transparency of occupational health and safety management processes (Order of the Ministry of Justice of Ukraine No. 1886/5, 2014; State labor service of Ukraine, 2024);

✓ optimisation of normative legal support – the introduction of EDM simplifies the work with the regulatory framework governing occupational health and safety. Thanks to the automatic updating of legislative acts and quick search for the necessary documents, enterprises can quickly adapt to changes in legislation and ensure compliance with the requirements of the Regulatory legal acts on occupational health and safety (Resolution of the Cabinet of Ministers of Ukraine No. 55, 2018; Hoshovska, 2023);

✓ environmental aspect of EDM implementation – refusal to use paper media helps to conserve natural resources, reduce paper recycling costs and reduce plastic waste. This is in line with modern environmental standards and sustainable development policy (Baturin *et al.*, 2020; What are the benefits..., 2023);

✓ increasing the level of interaction between customers and contractors – thanks to digital platforms, companies can coordinate cooperation with contractors faster and more efficiently. This applies to both the prompt approval of technical documentation and contractual activities in the field of labor protection (The future of occupational safety..., 2023; Goncharenko, 2023);

✓ digital competencies formation in future vocational education specialists – the use of EDM in the educational process contributes to the development of key skills required by a modern specialist in occupational safety and health and production process management. Future specialists learn to work with digital document management systems, which allows them to adapt to the requirements of the labor market and effectively imple-

ment the latest management practices in their professional activities (Hoshovska, 2023; Kamenska *et al.*, 2023).

The electronic document management system implementation in the occupational health and safety management system not only ensures technological modernisation of processes, but also contributes to their efficiency, transparency and compliance with modern requirements. Key benefits include optimisation of time and resources, increased control and safety, accessibility and mobility, as well as environmental and educational aspects. At the same time, the implementation of EDM requires overcoming a number of challenges related to technical infrastructure, legal aspects, data protection, and the development of digital competencies among employees. Consequently, the successful implementation of electronic document management in the field of occupational health and safety requires a comprehensive approach that combines organisational, technical and educational components.

Electronic document management integration into the educational process in the training of future occupational health and safety specialists

The electronic document management integration into the occupational health and safety management system not only increases the efficiency of management processes but also ensures the development of key competencies in future vocational education specialists. Automation, digitalisation, and remote access to documents create prerequisites for improving control over compliance with safety standards, simplifying learning processes, and reducing the cost of material resources (Borodiyenko *et al.*, 2023). Therefore, the use of EDM is a strategically important area of development of a modern enterprise and the educational process, which contributes to the training of qualified specialists who are able to work effectively in the digital economy.

The implementation of EDM in the occupational health and safety management system requires appropriate training of future specialists, including vocational teachers (occupational health and safety). An important task is to ensure effective training in the methods of working with electronic systems, the use of practice-oriented approaches and the adaptation of the content of educational programs to digital technologies. In order to develop digital competencies in the field of occupational safety and health among higher education students, it is advisable to use modern teaching methods that facilitate the integration of electronic document management into the educational process (Table 1).

Table 1. Teaching methods for the development of digital competencies in the field of occupational safety and health

Teaching method	Description
Project-based learning	Students perform tasks related to the development and implementation of electronic document management systems at enterprises. This approach helps to develop practical skills in working with digital platforms.

Teaching method	Description
Professional situations modeling	Students practice algorithms for creating, signing, archiving and controlling electronic documents according to normative and legal requirements
Problem-based learning	Students analyse the real challenges associated with the introduction of EDM in the occupational health and safety system and develop optimal solutions
Interactive teaching methods	Students use specialised software products, cloud services, and learning management systems (LMS) that provide quick access to training materials and practical tasks

Source: authors' own analysis based on researches of O. Harbych-Moshora, (2018); E.L. Baturin *et al.* (2020); O. Fedoruk (2021); Ye. Goncharenko (2023); I.V. Hoshovska (2023); K.V. Khizhnyak (2023); A.S. Ovsienko & M.V. Dubovchuk (2024)

Considerable potential in the training of future vocational teachers in occupational safety and health is provided by the use of the case method and simulation technologies (Wahyuni *et al.*, 2024). Practical cases allow to consider real scenarios of EDM implementation, in particular: analysis of the enterprises' experience using digital document management systems (for example: "M.E.Doc" (Saraswat *et al.*, 2024), "Vchasno", "Document.Online", etc.); students performing practical tasks on processing electronic documentation, including creating, signing, transferring and storing documents according to regulatory requirements; using simulations to work out critical situations that may arise during electronic document management (for example, detecting violations, checking compliance with regulations, risk management).

Software for electronic document management in occupational health and safety and the educational process

Modern digital platforms are used to ensure the effective functioning of electronic document management in the field of occupational safety and health and to train future specialists. They facilitate automation of document management processes, increase transparency and

control over compliance with regulatory requirements, and provide quick access to the necessary information. The electronic document management systems presented in Table 2 differ in their functionality and approaches to automating document management in the field of occupational health and safety. For example, M.E.Doc facilitates the official exchange of documents between businesses and government agencies, which is critical for regulatory activities. VCHASNO.EDO and Document.Online offer effective cloud-based solutions for automating internal processes of enterprises, enabling quick approval and signing of documents. Solutions such as Microsoft SharePoint and BAS Document Management are focused on corporate document management and integration with other digital platforms, which facilitates control over compliance with regulatory requirements in the field of occupational health and safety. Google Workspace cloud services contribute to the creation of a unified information ecosystem for educational institutions and enterprises, ensuring effective interaction between employees and students. At the same time, the Megapolis.DocNet is a popular system in the public sector, which guarantees centralised control over the implementation of labor safety requirements (Electronic document management, n.d.).

Table 2. Overview of digital platforms for electronic document management in the field of occupational health and safety

No.	Platform name	Main functions	Use in the field of labor protection	Features and benefits
1.	M.E.Doc	Document exchange, reporting, integration with government agencies	Regulatory reports submission, document flow automation	Minimises errors, digital archive
2.	VCHASNO.EDO	Cloud storage, electronic signature, document status control	Operational documents exchange between employees	Flexible access from any device
3.	Document.Online	Automate document exchange, signing, and storage	Digital competencies development, management transparency	Centralised storage, changes history
4.	Microsoft SharePoint	File collaboration, electronic archives, integration with Microsoft 365	Access to instructions, reports, task performance monitoring	Integration with corporate services
5.	BAS Document Management	Management process automation, normative acts control	Documents structuring, approval routes	Analytics and reporting functionality
6.	Google Workspace	Cloud storage, Google Docs, Forms, Drive	Regulatory documents creation and editing, knowledge testing	Easy access, integration with other Google services
7.	Megapolis.DocNet	Compliance control, unified document registry	Automated control of occupational safety and health	Documents status tracking in real time

Source: authors' compilation based on the catalog of systems and programs for business from Electronic document management (n.d.)

To summarise, M.E.Doc, BAS Document Management, and Microsoft SharePoint are most effective for large organisations with complex document management structures and high integration and security requirements. Meanwhile, VCHASNO.EDO, Document. Online, and Google Workspace are the best for small and medium-sized enterprises or teams working remotely, as they provide convenient access and ease of use. The Megapolis.DocNet is very effective for companies that need specific control over occupational safety and health, but its functionality may be too narrow for general use in other areas. The software choice depends on the specifics of the enterprise or educational institution, the digitalisation level and the need for integration with other information systems. Consequently, the introduction of electronic document management into the occupational health and safety management system not only contributes to the efficiency of safety process administration, but also becomes an integral part of the training of future vocational teachers. The integration of digital technologies into the educational process allows to form competent specialists who are able to effectively use modern automation tools in their professional activities.

Taking into account that the discipline "Supervisory Activity Organisation in the Field of Occupational Health and Safety" is one of the key disciplines in the training of future occupational health and safety teachers, it is necessary to integrate the issues of digital transformation of documentary processes into its content. The main areas of adaptation are: supplementing the educational content with modules covering the peculiarities of legal regulation of EDM in the field of occupational safety and health, standards of digital signature and electronic archiving of documents; introduction of laboratory classes using real software platforms used in industry for electronic document management; digital competencies development of teachers who train future vocational teachers in occupational health and safety through their involvement in trainings and educational programs on the use of digital technologies in professional activities (Wahyuni *et al.*, 2024).

The implementation of modern digital platforms for electronic document management in the occupational health and safety management system is an important condition for improving the efficiency of administrative processes, compliance with regulatory requirements and ensuring information transparency. The relevance of their use is also growing in the context of training future specialists, in particular, vocational teachers of occupational safety and health, for whom digital competencies are of key importance. Integration of electronic document management into the content of professional training, focused on legal regulation, practical application of software products and development of digital literacy, contributes to the formation of the ability to function effectively in the context of digital transformation of the production environment.

Methodological recommendations for the integration of EDM issues into the training programs of future vocational teachers in occupational safety and health

The authors suggest methodological recommendations for the integration of electronic document management into the educational programs of training future teachers of vocational training in occupational safety and health, which would contribute to the formation of students' digital competencies and the effective use of modern information technologies in professional activities:

1. Introduction of the subject of EDM into educational programs (introduction of a separate module or topic within the disciplines "Fundamentals of Occupational Health and Safety", "Organisation of Supervisory Activities in the Field of Occupational Health and Safety", "Modern Information Technologies", "Modern Technologies of Distance Education", "Information Technologies in the System of Vocational Education", etc.; coverage of regulatory and legal aspects of EDM implementation in the field of occupational health and safety).

2. Use of a practice-oriented approach (conducting trainings and workshops using real EDM programs (M.E.Doc, "Vchasno", document management in Moodle, Google Workspace, etc.); organisation of case methods based on real examples from enterprises).

3. Formation of digital competencies (familiarisation with digital signatures, cloud-based document storage and processing services; training in the principles of information security in working with electronic documents).

4. Use of blended and distance learning technologies (use of e-learning platforms to model the document management process; students performing practical tasks through online EDM systems).

5. EDM integration into pedagogical practice (creation of an electronic portfolio of students with examples of working documentation on occupational safety and health; introduction of self-study and microlearning methods for advanced training in EDM).

These recommendations would contribute to the formation of professional competencies of future vocational teachers and ensure their ability to effectively apply modern technologies of electronic document management in the field of occupational safety and health and in professional teaching.

Prospects and challenges of implementing electronic document management in the training of vocational teachers in occupational safety and health

The electronic document management (EDM) implementation in the occupational health and safety management system is one of the key areas of digital transformation of professional activities. This requires an appropriate level of training for future occupational health and safety teachers, which requires adaptation of the educational process. However, the process of integrating digital technologies into

curricula is accompanied by a number of challenges that require a comprehensive analysis and development of effective solutions.

Despite the obvious advantages of electronic document management, its implementation in the educational process of training future occupational health and safety vocational teachers faces a number of problems, namely: insufficient level of digital literacy – some students and teachers do not have the necessary skills to work with electronic document management systems, which complicates their integration into the educational process; lack of unified standards for EDM training – educational programs do not always contain systemic modules aimed at developing competencies in the field of digital document management, which leads to fragmentation of knowledge of higher education students; limited access to specialised software – educational institutions do not often have the opportunity to use modern digital platforms for students' practical training, which reduces the learning efficiency; legal and organisational barriers – the EDM implementation is regulated by a number of normative acts, compliance with which requires special training. The lack of training materials covering the legal aspects of EDM may result in an incomplete understanding of legal requirements by future professionals; resistance to change – traditional methods of record keeping remain dominant in many educational institutions and businesses, making it difficult to transition to digital technologies.

Consequently, taking into account the main problems of electronic document management implementation and its use, it is necessary to realise a set of measures to improve the educational process in order to ensure high-quality training of future vocational teachers in occupational safety and health, capable of effectively using electronic document management in the field of occupational safety and health, namely: development of specialised training modules on electronic document management that would cover both the technical aspects of working with digital platforms and the legal norms for regulating document management in the field of occupational safety and health; introduction of practical training using real electronic document management systems, which would allow students to gain experience with the relevant software; teachers' digital competence

development by conducting seminars, webinars and certification courses on modern document management technologies and their implementation in professional activities; interactive educational platforms creation and distance learning implementation, which would facilitate the flexibility of the educational process and increase the availability of educational resources; electronic document management integration into educational components through project-based and problem-based learning methods, which would allow students to solve real-world problems in the field of occupational safety and health; expanding cooperation between educational institutions and enterprises, which would facilitate the creation of practice bases for students using digital document management technologies.

In addition, an important step in the training of future occupational health and safety professionals is access to relevant professional publications. One such source is the periodical electronic publication "Expertus: Occupational Safety & Health" (Expertus..., n.d.), which contains analytical materials, practical recommendations and regulatory updates in the field of occupational safety and health. Subscription to this publication would provide students and teachers with the opportunity to receive the latest information on legislative changes, modern methods of occupational safety management and best practices in the use of electronic document management in this area. This would help to improve their professional training and integrate digital technologies into the educational process.

Visualisation of the model for implementing electronic document management in the system of occupational safety management and training of future vocational education specialists

The authors have distinguished a model for the electronic document management system implementation in the occupational health and safety management system and training of future vocational teachers (occupational health and safety). The development of the model (Table 3) would allow structuring the process of introducing EDM into the occupational health and safety management system and identifying the key stages of training future vocational teachers (occupational health and safety).

Table 3. Model of electronic document management implementation in the system of occupational health and safety management and training of future vocational education specialists

Conceptual basis			
Optimisation of occupational health and safety management processes through the introduction of EDM and training of future vocational teachers in its use			
Principles			
Digitalisation	Modern technologies integration	Interdisciplinary approach	Competence-based approach
Structural components			
Organisational component (normative and legal framework, staffing)	Educational component (specialists' training through digital technologies and teaching methods)	Technological component (software tools and EDM infrastructure)	

Structural components		
Determination of the normative and legal framework for the EDM implementation	Updating educational programs in view of digitalisation	Modern learning software usage (M.E.Doc, DocProf, Microsoft SharePoint, etc.)
Technical capabilities and software analysis	Teaching disciplines related to EDM (for example, "Organisation of supervisory activities in the field of occupational safety and health", "Occupational safety and health expertise", "Monitoring of the working environment and certification of workplaces", "State social insurance against accidents, occupational diseases and accidents at work", etc.)	Training simulators integration for working with digital documents
Process participants identification (administration, teachers, students, employers)	Applying practice-oriented teaching methods (case method, simulations, work with real documents)	Cloud technologies usage for document sharing and processing
Evaluation component (performance monitoring and process improvement)		
Monitoring the effectiveness of EDM implementation in the educational process	The higher education students' competence level assessment	Analysis of the results of graduate training at enterprises
Expected results (increased security, management efficiency and digital competencies of specialists)		
Digital competencies development in future vocational teachers	Document flow optimisation in the field of occupational health and safety at enterprises	Improving the specialists' training level according to the digital economy requirements
Higher education applicants certification		
Competitive qualified specialist of a new formation and demanded in the market of educational services		

Source: authors' compilation based on the legal documents of the Law of Ukraine No. 851-IV (2003); Law of Ukraine No. 2155-VIII (2017); Order of the Ministry of Education and Science of Ukraine No. 1460 (2019); Educational and Professional Program... (2024)

The suggested model for implementing electronic document management in the system of occupational safety and health management and training of future vocational teachers is comprehensive and integrative. It covers the conceptual framework, structural components, and expected results that provide a systematic approach to the digital transformation of the industry. Taking into account the interdisciplinary and competency-based approaches, the model allows combining the regulatory, educational and technological components necessary for effective training of specialists. Particular attention is paid to practice-oriented training, the use of modern digital tools, and results monitoring. This ap-

proach contributes not only to the optimisation of management processes in the field of occupational health and safety, but also to the formation of a competitive specialist capable of adapting to the digital economy.

Algorithm for implementing an electronic document management model in the occupational health and safety management system

The offered model of EDM implementation in the occupational health and safety management system provides for the gradual integration of digital technologies into the process of training future vocational teachers (Table 4).

Table 4. Stages of implementation of the model of optimisation of occupational safety and health management through the introduction of EDM and training of future vocational teachers

Key stage	Description
Needs analysis	Study the current state of electronic document management in the field of occupational safety and health, determine regulatory requirements and identify the main challenges associated with the digitalisation of documentary processes.
Educational content development	Developing educational materials containing theoretical and practical aspects of using EDM, including the integration of digital technologies into curricula for training future specialists.
Academic disciplines adaptation	Adapting academic disciplines to meet the requirements of digital document management, including updating course content to reflect the latest methods of electronic document management.
Teachers' training	Ensuring the professional development of vocational teachers by mastering modern electronic document management systems, methods of their implementation in the educational process, and the use of digital tools for effective teaching.
Pilot implementation	Approving electronic document management in the educational process in order to assess the effectiveness of methodological approaches, conducting practical classes using EDM and introducing case studies to develop the professional competencies of higher education students.
Evaluation and adjustment	The implementation results analysis, determining the level of higher education students' digital competencies development, improving educational programs based on the data obtained and feedback from the educational process participants.

Source: authors' compilation based on the scientific papers and regulatory documents analysis of Order of the Ministry of Education and Science of Ukraine No. 1460 (2019); E.D. Wahyuni *et al.* (2024), R. Saraswat, *et al.* (2024); Educational and Professional Program... (2024)

The present algorithm is aimed at improving the quality of professional training of future vocational teachers (occupational safety and health) by integrating modern digital document management technologies. The integration of electronic document management into the training of future vocational teachers in occupational safety and health opens up broad prospects for increasing the efficiency of document management and improving educational activities. However, the realisation of this goal requires a systematic approach that involves removing barriers, improving curricula, and introducing modern digital solutions into the educational process. Optimisation of approaches to training students in the field of electronic document management would ensure that their qualifications meet the current requirements of the labor market and promote the development of a digital culture in the field of occupational safety and health.

The electronic document management implementation in the field of occupational safety and health and in the educational process is a topical issue that is being studied by many researchers. This section compares the results of this study with the works of other authors and identifies common and different approaches. O. Fedoruk (2021) analysed the peculiarities of the introduction of a qualified electronic signature (QES) in educational institutions. The author focuses on the regulatory aspects of the use of QES, its importance for the digital transformation of document management and the need to train educators to work with electronic documents. The study emphasises that the effective use of QES contributes to the security of electronic document management, increases the legal significance of digital documents, and optimises management processes in the field of education. The present study supports these conclusions, as it also emphasises the importance of digitalisation of the educational process and the use of modern electronic tools in the field of occupational health and safety. However, while O. Fedoruk (2021) studied the general aspects of QES in educational institutions, the present study is aimed at training vocational teachers in occupational safety and health and assessing the impact of electronic document management on the effectiveness of occupational safety and health management.

S.M. Tukalo (2021) studied the organisational and pedagogical principles of implementing EDM on the SharePoint platform in scientific institutions. The author developed a model for implementing an EDM system and substantiated the use of a digital portfolio of a researcher. This work also considers the use of modern digital platforms, including Microsoft SharePoint, but this study focuses on their use in the educational process in the training of vocational teachers of occupational safety and health. The difference is that S.M. Tukalo (2021) focused on scientific institutions, while this paper focuses on educational institutions.

V. Hryshyn & L. Filipova (2023) analysed the key trends in the document management systems digitalisation in public authorities, emphasizing the importance of introducing modern information technologies to improve the efficiency of management processes. In their work, the authors emphasise the challenges associated with the adaptation of government agencies to new digital services. Researchers M.O. Vronskyi & I.V. Panchenko (2022) analysed the introduction of EDM in the personnel work of higher education institutions, identified the main problems and features of this process. The authors emphasise the need for organisational changes and staff adaptation to new digital tools. The study confirms these conclusions, as the training of future vocational teachers involves the development of digital competencies for the effective use of EDM. There is a common understanding of the importance of adapting educational programs, but this study focuses on the specifics of occupational safety and health. N. Zakharchenko *et al.* (2017) in their study consider the impact of electronic document management (EDM) on business efficiency. The authors note that the EDM implementation can significantly reduce the time for document processing, reduce errors and increase the efficiency of communication between departments. This is important for occupational health and safety management, as it facilitates information processing and improves management processes at enterprises.

The study by K. Yurchenko (2020) focused on the risks associated with the EDM implementation, in particular, the risks of data loss and unauthorised access to data. The author proposed strategies to minimise these risks, including the use of security systems, backups, and staff training. The author's research is important for occupational health and safety management, as the storage and processing of sensitive information requires a high level of security and reliable data protection mechanisms. I. Zastrozhnikova (2020) studied the conceptual framework of EDM in education, emphasizing its functions, such as reducing time and saving resources. The author notes that EDM in educational institutions contributes to the continuity of document flow and avoidance of duplication. The proposed study confirms these benefits, adding that in the context of occupational health and safety, EDM also contributes to improved safety and control over compliance with regulatory requirements.

Researchers A.S. Ovsiyenko & M.V. Dubovchuk (2024) and R. Kravets *et al.* (2023) analysed the EDM implementation in the enterprise management system, paying attention to integration with existing systems and security issues. The authors emphasised that efficient processing of growing amounts of information is possible only if processes are automated. The presented study agrees with this statement, adding that in the educational process, document flow automation contributes to improving the quality of future occupational health and safety specialists' training.

O. Harbych-Moshora (2018) studied the advantages and organisation of EDM systems in higher education institutions, identifying the basic requirements for such systems. The author notes that the EDM integration into the educational process faces certain challenges, such as the need to train staff and adapt to new technologies. This study also points out these challenges, but adds that the use of case studies and simulations can contribute to more effective training and adaptation.

Consequently, the scientific sources analysis shows that there is a general recognition of the EDM implementation importance in the educational process and in the field of occupational safety and health. Common to all studies is the emphasis on the need to adapt educational programs, staff training and integration of modern digital tools. The differences lie in the specifics of the use of EDM in various industries and approaches to its implementation. The present study contributes to this discussion by focusing on the training of vocational teachers in occupational health and safety and proposing a model for the phased EDM implementation in the occupational health and safety management system.

Conclusions

The conducted research confirms that the electronic document management implementation in the occupational health and safety management system is an important factor in the modernisation of the educational process of training future vocational teachers in occupational health and safety. The analysis of existing approaches to the integration of digital technologies into education has shown that the EDM use contributes to improving the level of professional competence of higher education students, forming their digital skills and developing analytical thinking.

The main challenges to the effective implementation of EDM are still insufficient digital literacy of teachers and students; lack of unified standards for teaching electronic document management systems; limited access to modern software; organisational and regulatory barriers to the use of digital technologies in the educational process. However, taking appropriate measures would help to overcome these difficulties and create an effective system of training future vocational teachers in occupational safety and health that meets modern digitalisation requirements. Optimizing the training of future vocational specialists in occupational health and safety requires an integrated approach to the electronic document management implementation, which involves its integration into educational programs through the development of relevant training modules, the use of interactive platforms and simulations, and

the improvement of regulatory support and methodological recommendations.

The electronic document management integration into the educational process is a prerequisite for training competitive vocational specialists. The use of modern teaching methods, practical cases, and simulation technologies contributes to the development of professional competencies of higher education students, allowing them to work effectively with digital systems in their future professional activities. Adaptation of academic disciplines to digital realities ensures that educational programs meet modern labor market requirements and promotes the digital transformation of occupational health and safety management.

Strengthening cooperation between higher education institutions and enterprises, which would allow students to master digital document management technologies in practice, as well as introducing problem-based learning, which would contribute to the formation of analytical thinking and professional competencies, are also important areas. Consequently, the further development of electronic document management in the training of vocational teachers of occupational health and safety would help to improve the quality of the educational process, develop students' modern competencies and ensure their competitiveness in the labor market. The study does not exhaust all aspects of this problem. Prospects for further research in this area would be aimed at studying the impact of electronic document management on the safety of production processes, in particular, analysing the effectiveness of its use at enterprises and assessing its role in reducing production risks.

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**Впровадження електронного документообігу
в систему управління охорони праці:
сучасні підходи у підготовці майбутніх фахівців професійної освіти**

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Анотація. Цифровізація управлінських процесів є важливим чинником підвищення ефективності професійної діяльності в різних сферах, зокрема в охороні праці. Впровадження електронного документообігу (ЕДО) в систему управління охороною праці сприяє оптимізації документообігу, підвищенню рівня інформаційної безпеки, зменшенню впливу людського фактора та забезпеченню безперервного контролю за дотриманням вимог законодавства. Метою дослідження було проаналізувати можливості впровадження електронного документообігу у сфері охорони праці та професійної освіти, визначити ключові цифрові інструменти для його реалізації та оцінити їх вплив на ефективність управлінських процесів. Для досягнення поставленої мети використано комплекс взаємодоповнюючих методів дослідження: теоретичний аналіз, синтез та узагальнення наукових джерел, навчально-методичної та нормативно-правової документації; моделювання інтеграції цифрових технологій у навчальні програми; емпіричні методи (аналіз освітніх програм, спостереження за педагогічною діяльністю викладачів) для оцінки особливостей упровадження ЕДО в підготовку майбутніх фахівців професійної освіти. У дослідженні розглянуто сучасні цифрові технології та програмні рішення для автоматизації документообігу, які можуть бути інтегровані в освітній процес. Визначено ключові переваги використання ЕДО, серед яких: підвищення оперативності документообігу, скорочення витрат на паперові ресурси, забезпечення доступності даних, покращення контролю за дотриманням нормативних вимог і мінімізація ризиків інформаційних загроз. Обґрунтовано необхідність оновлення освітніх програм через впровадження навчальних модулів, що охоплюють як технічні аспекти роботи з цифровими платформами, так і правові основи електронного документообігу. Аргументовано перспективи подальшого вдосконалення освітнього процесу шляхом інтеграції цифрових компетентностей у підготовку майбутніх педагогів професійного навчання (охорона праці). Результати дослідження можуть бути використані для модернізації освітніх програм, підготовки фахівців з охорони праці, оптимізації управлінських процесів у закладах освіти та підвищення ефективності документального супроводу професійної діяльності

Ключові слова: цифрове документознавство; автоматизація управлінських процесів; інформаційна безпека; дистанційне адміністрування; освітні цифрові ресурси; оптимізація документообігу



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Linguistic and social aspects of internet discourse: Challenges and prospects

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Abstract. The article examined the concept of discourse and its various typologies, which are the subject of interdisciplinary research. Special attention was paid to electronic discourse, which includes such subtypes as computer, virtual and Internet discourse. It was determined that the development of information technologies has significantly influenced the peculiarities of communication in the digital environment, contributing to the emergence of new forms of interaction, changes in speech practices and adaptation of natural language to technological conditions. Internet discourse is a key form of modern communication that combines both verbal and non-verbal elements, including emojis, graphic selections and sound phrases. The author also examined the impact of Internet communication on language styles, including the tendency to shorten statements, use abbreviations and introduce new expressive means. The role of English as a universal means of communication in the virtual space is noted, which affects the linguistic situation in Ukraine. The study has established that the digital environment contributes to the formation of new communication strategies and speech norms, which are gradually being consolidated in the language practice of users. The analysis of the texts of online communication has shown the existence of stable models of interaction that are highly contextual and expressive. It was found that agrammatism, characteristic of online communication, is not an accidental phenomenon, but functions as a means of increasing the speed and convenience of communication. The study has confirmed that online discourse plays an important role in the transformation of the modern language, influencing the norms of written and oral communication. The obtained results allow to predict further changes in the language behaviour of users of digital platforms, which are associated with the further development of technology and globalisation processes

Keywords: discourse; Internet discourse; communication; electronic discourse; computational linguistics; language changes; digital environment; research results

Introduction

The current stage in society's development is characterised by the intense influence of digital technologies that transform the means of communication and form new

spaces of interaction. The relevance of the chosen research topic lies in the fact that contemporary Internet discourse not only reflects social, political and cultural

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processes, but also acts as a factor in their formation. Understanding the peculiarities of electronic communication, in particular its genre and stylistic transformations, is necessary for the development of practical recommendations for adapting traditional forms of communication to the digital age. In the context of rapid changes in the information space, the study of online communication is of particular importance for ensuring effective interaction between social actors and optimising information processes.

A review of recent publications on this topic has revealed both significant achievements and existing research gaps. J. He (2019) examined readers' contextual models in her work, believing that they are a cognitive link between online discourse properties and social strategies in the process of news comprehension. L. Chouliarakis & N. Fairclough (2021) have elaborated on critical discourse analysis as a form of critical social research in relation to a variety of theories from philosophy of science to social theory and from political science to sociology and linguistics. M. KhosraviNik (2022) examined critical discourse studies, in particular, power and manipulation manifested in communication, and determined that in the context of social media communication, which is changing the paradigm of interaction, critical discourse studies rethink the meaning of digital expressions in local and global contexts. M. Dynel (2025) has contributed to the study of Internet memes, which are considered as subjects of discourse of (de)legitimation, and its empirical focus is on memes related to irreplaceable tokens. R. Guadagno *et al.* (2023) analysed foul language in online discourse, an experience that is often perceived as a violation of norms and can affect group performance in online group discussion, as well as spread virally online.

Ukrainian researchers have published many publications on Internet discourse. Thus, N. Zrazhevska (2022), based on analytical and synthetic research, considered the classification of methods for studying media culture as a metacultural phenomenon and proposed an original classification of media culture research methods that emphasised an interdisciplinary approach to its study. O. Marukhovska-Kartunova *et al.* (2023) believed that online journalism is characterised by a variety of information sources, the ability to disseminate news quickly, interaction with the audience, global reach and open access to information. At the same time, the researchers acknowledged that online journalism has its drawbacks, including manipulation and the spread of fake news used by Russian propaganda, and emphasised the vulnerability of this form of journalism.

O. Domnich *et al.* (2023) found out how Internet discourse and online resources contribute to the formation of new linguistic theories, the practice of linguistic research and their importance in the context of university teaching, and also established the main trajectories of linguistic development in the theory and practice of

Internet discourse research and emphasised the impact of Internet discourse on linguistics and language resources within their linguistic manifestations. T. Biletska *et al.* (2023) traced the pragmatic level of sports blogs, identified the main communication strategies used in sports blogs, described communication tactics, as well as their linguistic operationalisation. O. Styshov (2024) examined uncodified colloquial phraseological units of the Ukrainian language, which function mainly in live spoken language and gradually penetrate the Internet, mass media and literary discourses.

The emergence of technological developments has contributed to significant changes and created the reality of Internet discourse, characterised by the communicative power and enormous social potential of the World Wide Web. At the present stage of the study of discursive practices, linguistics is intertwined with other scientific disciplines. In particular, it draws on the results of sociology, political science, economics and philosophy and uses their tools and methodologies. In addition, linguistics covers issues of manipulation, learning, privacy and security, which contributes to its multifaceted approach. Research in contemporary linguistics is guided by specific questions that address the complex interactions between different aspects of language and the Internet. A. AbuSa'aleek (2015) emphasised that a new subfield of linguistics studies the languages most affected by the Internet, leading to the formation of a large Internet-related vocabulary.

The analysis of current publications has shown that there is a need for a comprehensive study of Internet discourse, covering both structural and communicative, as well as socio-cultural aspects of its development. Unresolved problems, such as the limited analysis of genre transformations, insufficient attention to hypertextuality, and the lack of generalised models of speech transformation in the digital environment, confirmed the need for further research in this area. These issues are the subject of further analysis in the article.

The purpose of the study was to comprehensively analyse the transformation of online discourse in the context of modern digital technologies and to identify patterns of change in communication practices. The research was aimed at identifying specific features of online communication, revealing the impact of electronic media on traditional forms of broadcasting, and developing recommendations for integrating new communication models into the practice of public dialogue. The study aimed to overcome existing gaps in the scientific literature and provide new scientific grounds for understanding the role of online discourse in the modern information age.

Materials and Methods

To study Internet discourses, a number of scientific methods were used to provide a comprehensive and in-depth understanding of the phenomena of electronic

communication in the context of modern digital media. The main material of the study was composed of texts from various sources, covering both the online environment and traditional communication channels. The empirical basis of the study was made up of electronic texts collected from official websites, blogs, forums, social networks and messaging platforms (Ukrinform, n.d.; Radio Svoboda Ukraine, n.d.; Verkhovna Rada of Ukraine, n.d.). Particular attention was paid to the analysis of comments and discussions on news portals, publications in online media – Television News Service (n.d.), Ukrainian Pravda (n.d.).

Traditional media sources were also used for comparison with digital discourse. These were newspaper articles, TV and radio programmes obtained from the archives of the mainstream media. The research period was the last five years (2019–2024), which allowed to trace the evolution of language patterns in the process of rapid technological progress and globalisation. Several complementary methods were used to analyse the collected material.

The method of analogy allowed a comparative analysis of online discourse with more traditional forms of communication, such as newspaper articles and television programmes. Analogies were used to identify similarities and differences in the ways in which opinions are expressed, arguments are constructed, rhetorical techniques are used, and ways of influencing public opinion. Examples of traditional media were used as cases to create basic comparative criteria. Using the method of synthesis, the results of previous studies (Shkola *et al.*, 2022; Domnich *et al.*, 2023; Malisheva, 2023) and own data were systematised to identify general trends and patterns in the development of online discourse. This synthesis helped to form a holistic picture of the changes taking place in various online environments and identify key features of digital communication.

Observations were conducted using both traditional and automated analysis methods, which allowed to record changes in language patterns, identify new topics of discourse and study the dynamics of communication in real time. The analysis covered a variety of data forms, including textual and audiovisual information, which provided a deeper understanding of digital communication processes.

A detailed content analysis was conducted to analyse the textual structure, lexical features, syntactic structures and functional elements of the discourse. This analysis allowed to determine how new language tools are formed on the Internet, how neologisms, abbreviations, icons and other means of conveying emotions are used, as well as what stylistic features are inherent in online communication compared to traditional media.

The historical method allowed to trace the stages of online discourse development and, in particular, to analyse the impact of important historical events, technological innovations and globalisation processes on the formation of digital communication. This method helps

to reconstruct the process of discourse evolution, which is important for understanding its current state. To compare traditional and online discourse, a number of criteria were identified, including, language structure and lexical richness; use of neologisms, abbreviations and symbols; ways of conveying emotions (icons, punctuation, repetition of letters); level of interactivity and the possibility of instant feedback; influence on the formation of public opinion; emotional colouring of messages.

The integrated use of analogy, generalisation, observation, analysis and historical approach allowed a comprehensive study of both formal and functional aspects of online discourse. This approach helped to identify the evolutionary features of digital communication and the impact of modern technologies on the transformation of linguistic culture.

■ Results and Discussion

In scientific thought, there is no single and generally accepted definition of the term “discourse”, which can be explained by the wide popularity of this term and the fact that it is the subject of interdisciplinary research. On the one hand, discourse is related to the pragmatic situation necessary to determine the coherence of discourse, its communicative adequacy and interpretation, and on the other hand, to the mental processes of communication (psychological, sociocultural, ethnographic principles and strategies of generating and understanding speech in specific conditions). Discourse develops within a specific situation, and discourse analysis provides an opportunity to understand the interaction of people aimed at achieving certain goals, where communicators interpret each other's speech and actions. Thus, discourse analysis takes into account extra-linguistic factors, which expands the scope of interpretation.

The large number of discourse typologies is explained by the fact that not all of them have clear classification criteria and sufficient empirical material, while the emergence of new classifications is influenced by various spheres of human activity that can generate their own type of discourse. G. Shkola *et al.* (2022) are convinced that the typology of discourse is always historically determined and is chosen by the researcher in each case to solve specific problems. This suggests that a complete classification of discourse types is unlikely or inadequate. However, attempts to create a universal classification of discourse types do not stop. Today, the leading criteria for distinguishing discourse types are those related to discourse categories and can be distinguished in terms of formal, functional, and substantive criteria. Therefore, the entire general discourse can be logically divided according to one or another criterion.

According to M. Malisheva (2023), in “Ukrainian-language scientific research, there is an identification of the terms “virtual discourse”, “Internet discourse”, “computer discourse”, “computer-mediated discourse”, “electronic discourse”, “network discourse”. The term

“electronic discourse” is a hyperonym that unites all of the above types of discourse”. M. Karpenko (2016) believes that electronic discourse is verbal and non-verbal communication through electronic devices or communication mediated by electronic devices. According to M. Malisheva (2023), within electronic discourse there is computer discourse, namely communication mediated by a computer, and within computer discourse there is virtual discourse. Within virtual discourse, there are Internet discourses (online discourses).

Computer discourse is considered as a set of texts with a common theme related to modern computers and information technologies. Therefore, computer discourse is understood as communication that takes place through electronic means of communication. The main characteristic of computer-mediated communication is that communicators communicate in cyberspace. Computer-mediated communication is carried out on the local, national and global Internet. Communication in networks differs in the form of interaction (online, offline), the direction of communication (monologue, dialogue, multimedia) and the degree of openness and accessibility (open, closed). Language systems can be compared to living organisms that are constantly changing, developing and adapting to meet the communication needs of their speakers. O. Domnich *et al.* (2023) argued that natural languages demonstrate a unique ability to adapt to technological progress and play an important role in ensuring effective communication in both private and professional environments. The emergence of new means of interaction is an integral part of globalisation, where artificial language organically merges with natural language, leading to the formation of Internet discourse. Globalisation improves the quality of life and facilitates the constant exchange of information, innovations and technologies.

One of the main functions of Internet discourse is to enable online collaboration so that people can interact effectively in the digital environment. Internet discourse would not be possible if the Internet did not exist or if members of the language community did not use their native language in the online space. The development of modern information technologies has contributed to the emergence of new forms of communication that are becoming increasingly important in public life. Discourse on the Internet has become the focus of attention for many researchers in the humanities, such as linguistics, philosophy and psychology. This is due to the fact that the Internet has become a universal means of exchanging information, covering both written and spoken language. A.V. Shuhaiev (2019) noted that the Internet discourse has recently gained significant importance due to the growing informatisation of society. R. Kluver (2000) defined informatisation as a process in which information technology transforms social and economic relations and minimises cultural and economic barriers.

Modern communication channels demonstrate the ability to unite the world through stable multimodal connections based on digital technologies. Innovative means of information exchange contribute to increasing social productivity, changing everyday life and providing free access to the dissemination of ideas in the digital space. M. McLuhan (2006) described the digital world as a global theatre where everyone should actively participate in the process of information transfer through modern communication channels, rather than remain a passive observer. In this context, informatisation can be defined as the transition from the industrial age to the information age, in which media participate in social and political life. Information is becoming an important tool for increasing labour productivity, solving global problems of humanity and promoting the intellectual development of society.

Discourse on the Internet transforms texts, adapts them to modern values and creates new areas of communication that fill gaps in people's minds and give them new semantic tones. The popularity of the phenomenon is explained by the availability of a huge amount of digital information covering a wide range of topics. Internet users can use search engines to find information and access materials from certain web resources (Ukrinform, n.d.; Radio Svoboda Ukraine, n.d.; Verkhovna Rada of Ukraine, n.d.). The relevance of information on the web is an indicator of the recipient's awareness of global and local socio-political processes taking place in the world.

Information technologies are transforming all spheres of public life, from personal interaction to international relations. In this context, Internet discourse is becoming an important element in the formation of an individual's information culture. As a powerful communication tool, the Internet expands information flows, overcomes isolation and prevents marginalisation of users. The mass media (Television News Service, n.d.; Ukrainian Pravda, n.d.) and public relations services allow the production and dissemination of information materials and effective communication with individuals and social groups. The creation of a common information space between content producers and target audiences strengthens the influence of stakeholders on the public sphere and facilitates dialogue between governments and citizens. N.H. Lukashenko (2006) argued that only 10 % of a person's worldview is formed on the basis of personal experience, while the rest of the information comes from external sources, including the mass media and the Internet. Internet discourse is characterised by its hybrid nature. Although it takes place in written form, its structure and style are similar to spoken language.

Although Internet discourse has features of spoken and written language, its nature is very different. D. Crystal (2004) identified the main features that distinguish Internet discourse from oral communication. These include the absence of simultaneous feedback, meaning that the recipient of a message cannot respond

immediately, which makes it difficult for the sender to assess the correctness of his or her understanding or interpretation of the message; the slow rhythm of communication, for example, replies to emails can take from several minutes to months; the restriction or immutability of communicative roles due to technological limitations; the absence of prosodic and paralinguistic means (intonation, stress).

An analysis of these differences shows that online discourse has more in common with the written word, but has some features that distinguish it from other forms of communication. In particular, Internet discourse, sometimes called "metacommunicative minimalism", differs significantly from traditional written language. Firstly, web pages are constantly changing and updating. Secondly, indexing systems that classify and organise texts have only a limited impact on the structure and function of the language of online discourse. Therefore, online discourse is a unique phenomenon with its own linguistic dynamics and rules. D. Crystal (2004) compared spoken, written and online communication, arguing that Internet discourse is a written language, and spoken language is closer to spoken language than to written language. He defined online discourse as "oral + written + electronically mediated functions" and considered it a new type of speech, not a hybrid form. In addition, the author called interactivity one of the features of online discourse. N.H. Lukashenko (2006) added to its characteristics the fact that online discourse contains elements of journalistic, scientific, publicistic, oral and artistic styles.

Languages change not only as a result of natural evolution, but also due to technological, political and social changes. The emergence of the Internet as a dynamic system and the rapid development of electronic communication have led to various changes in language. The emergence of new discourse practices requires new linguistic representations to adapt to these changes. In the study of K. Kitade (2000) argued that new technologies create opportunities for linguistic and pedagogical research. The language of the Internet is a particularly promising topic for research. The introduction of new means of communication has opened up new opportunities for expanding the system of linguistic units and has emerged as a promising topic for scientific research. This contributed to the emergence of Internet language studies, and the term "Internet linguistics" was coined to describe this new field of linguistic research. The study of Internet linguistics involves a comparative analysis of discourse practices in electronic discourse, that is the study of differences in the ways in which vocabulary and grammar are used in electronic resources.

The field of Internet linguistics is characterised by the study of the patterns underlying the emergence and evolution of new varieties of language. According to M. Sokol (2018), this includes the study the new forms of communication that have emerged as a result of the influence of the Internet, as well as the creation

of innovative means of linguistic expression. Another prominent research area is the development of specialised functional styles, which are especially relevant for the use of email as a means of communication. Internet linguistics studies electronic communication as a new form of interaction that uses linguistic units adapted for effective functioning in Internet discourse. From a linguistic point of view, electronic communication plays an important role as an essential means of expression. In today's society, the Internet permeates all aspects of human life, including education, science and various functional areas. In this context, language is very important, and therefore the study of its favourable influence on Internet discourse has become an integral aspect of contemporary reality.

Speech on the Internet is characterised by two main trends, namely the simultaneous complication of some linguistic means and simplification of others compared to traditional written speech; the interaction and competition between written and spoken speech. Discourses on the Internet have certain peculiarities. The structure of such discourses is understood as a hierarchical organisation of data, which, if properly structured and presented, allows an effective navigation between parts, from sub-elements to super-elements and vice versa. The main requirement for organising information in online discourse is a clear division of text blocks into relevant parts and the creation of internal links between them. The structure of online discourse is formed by hypertext. The elements of hypertext, such as hyperlinks and message texts, are represented in the linguistic context as electronic documents.

A hyperlink in online discourse is a list of keywords or phrases that can be underlined or highlighted to facilitate searching. As noted by A.V. Korolova (2008), the main function of hyperlinks is to provide navigation in electronic texts. Nowadays, computer-based communication is becoming increasingly important, and the Internet space is turning into a new environment that offers excellent opportunities for interpersonal and intercultural exchange. According to S. Danyliuk (2010), social networks, that is messages displayed on computer screens, can change their form and be presented in multimedia formats that combine text, graphics, audio and video. Interpersonal communication on the Internet differs in terms of the level of interaction. The universal pragmatic characteristics of Internet communication are communicative contact, empathy and self-expression strategies.

Among the main features that distinguish Internet communication from traditional interpersonal relationships are anonymity, which allows people to express their thoughts more freely, but can also encourage irresponsible behaviour in communication; ease of interaction, which makes communication more accessible and faster; brevity of the information transmitted, which is achieved through the widespread use of abbreviations, acronyms and symbols; the role of punctuation in

expressing emotions, which compensates for the lack of non-verbal communication; spontaneity of interaction, which can be easily interrupted or stopped at any time; atypical user behaviour driven by the desire for self-expression; in a virtual environment, people often choose different roles and scenarios than in reality; high trust in interlocutors, which often exceeds the level of trust in offline interaction; elimination of time and space boundaries, which makes communication possible from anywhere in the world, at any time.

Internet communication is a unique phenomenon that transforms the usual patterns of human interaction. Anonymity and distance from the real world reduce barriers to self-expression, but at the same time create an environment in which people are less likely to behave responsibly. Accessibility and the ability to interact regardless of place and time greatly simplify communication and fit into the concept of a global information society. The decrease in the amount of information and the growing role of emotional signs, such as icons and punctuation marks, demonstrate the adaptation of language to the digital environment and confirm theories about the evolution of language economy. The growth of trust in online interlocutors can be explained by the absence of an immediate threat of virtual communication, which is consistent with social psychology models that study behaviour in conditions of reduced control. Therefore, Internet communication not only facilitates the exchange of information but also creates new opportunities for social interaction, changing its nature and rules.

Researchers G. Shkola *et al.* (2022) determined that one of the peculiarities of Internet communication is that the processes of communication on the Internet affect the peculiarities of language styles. Internet users create new ways of using language, making it more concise, economical and practical. This changes the language itself and the ways it is expressed in text messages and gives rise to the existence of virtual versions of languages. English is the most common language in virtual environments, and it is also the starting point for communication participants who do not speak each other's language. Despite its physical and textual nature, participants in online communication perceive the environment almost linguistically. The peculiarity of online communication is its influence on language styles, especially Ukrainian. Communication in the virtual environment contributes to the creation of new forms of language use, making it more concise, economical and practical. As a result, the structure and representation of speech in text messages is changing, which is the basis for the existence of digital versions of the Ukrainian language. The Ukrainian language in the virtual space is also adapting to the requirements of the modern digital environment, but English remains the most common means of communication around the world. English is often the universal basis for communication participants who do not speak each other's language. Despite the written

form and visual nature of text messages, users perceive online communication almost as spoken language.

The authors L. Trachuk & L. Kaznacheieva (2023) noted that the Ukrainian language on the Internet is undergoing significant changes under the influence of the modern digital environment. These changes cover both lexical and syntactic levels. One of the most noticeable trends is the use of abbreviations, which allows users to convey information faster. Emojis are widely used to express emotions that are difficult to convey in plain text. Words and terms, especially those borrowed from English, are being integrated into the Ukrainian language environment, often with phonetic or grammatical adaptation. Therefore, virtual language becomes a tool for meeting practical communication needs while preserving the user's cultural identity. As for the emotions and images that underlie online discourse, online communication, despite its textual nature, is increasingly recognised by users as a kind of spoken language. This is due to the fact that virtual communication, especially communication in chat rooms, social networks and instant messengers, is dynamic, informal and often spontaneous. Participants in such communication not only transmit information, but also try to create a sense of presence, convey emotions and moods that are typical of live communication.

Textual imagery and emotional expressiveness in the virtual environment can be achieved in several ways, including:

- 1) the use of emojis, which function as a kind of emotional amplifier and are an integral part of online discourse. Emojis replace gestures, facial expressions, and intonation that are usually associated with spoken language. For example, a simple message such as "Дякую!" can be made warmer and more intimate by adding an emoji. Emojis can also be used to create visuals and stories, adding creativity to text;

- 2) repetition of letters. Increasing the number of letters and punctuation marks is an effective way to emphasise emotions. For example, the phrase "Дуже дякую!!!" sounds much more emotional than "Дякую!". Such words help to convey emotions, such as joy, admiration, or other feelings;

- 3) use of ellipsis and incomplete sentences. An ellipsis in sentences often indicates pause, reflection, or doubt. For example, the sentence "Я не знаю... може, це хороша ідея?" creates an air of uncertainty or hesitation that can be conveyed by tone and facial expression in oral communication;

- 4) Interjections and sound phrases. Interjections ("Ого!", "Ех!", "Оце так!") and sound phrases ("Ха-ха!" and "Ги-ги!") are often used in text messages. They add naturalness to the text and bring it closer to spoken language. These elements help to better convey reactions to certain events or statements of the interlocutor;

- 5) capitalise words and use graphic emphasis. The use of capitalisation in text often conveys a high tone or

emotional intensity, for example: "Я ТАКА ЩАСЛИВА!". Other graphic devices such as asterisks (very interesting) and symbols that emphasise important parts of the text;

6) creative use of words and expressions. In online communication, participants often play with words, create new structures, and use irony. Such expressions help to increase the emotionality and liveliness of communication, as they encourage positive interaction. These tools not only enrich the text, but also create a unique style of virtual conversation in which emotions and images come to the fore. At the same time, it helps the participants of the communication to compensate for the lack of physical contact, which is a natural human need in the process of communication.

Such emotional expressions have an impact not only from a practical point of view, but also on language culture. Especially among young people, these technologies are actively used to create new language traditions that may become part of official communication in the future. Therefore, the virtual environment is becoming not only a platform for information exchange, but also a cultural space where new forms of emotional expression emerge that reflect the spirit of the times.

As for syntactic changes and agrammatism in Internet discourse, there is a tendency to simplify and shorten. This is due to the desire of communication participants to exchange information quickly and save time. In the textual environment, where speed and efficiency play an important role, users often ignore traditional rules of grammar and punctuation, which leads to the phenomenon of agrammatism.

As defined by O.S. Chaban & V.H. Bezsheiko (n.d.), agrammatism is "an aphasic disorder that consists of an inability to construct grammatically correct sentences, up to and including disordered speech". Such deviations have become a typical feature of online communication. It manifests itself in the following forms:

1) lack of punctuation. Text messages often omit punctuation, which creates syntactic ambiguity. For example, "Як справи друже" is written instead of "Як справи, друже?". Complex sentences without commas, periods, or when only one letter is used instead of a combination ("." instead of "?!") are typical examples of this phenomenon;

2) inconsistency of sentence elements. Violation of the rules of lexical harmony in sentences is a common occurrence. For example, the incorrect formation of adverbs: "читати лежачи шкідливо" instead of the correct "читати лежачи шкідливо", verb tense: "він прийшов і розкажує" instead of "він прийшов і розповів", and the use of profane verb forms: "немало випускників хочать продовжити навчання" instead of "немало випускників прагнуть продовжити навчання" and other mistakes. This not only simplifies the syntax, but also emphasises the informality of communication;

3) syntactic breaks and incomplete sentences. According to A. Zahnitko (2012), anacoluthons are a common phenomenon in virtual speech that "reveals the

lack of consistency, coherence, logic and construction of speech, in conclusions; grammatical inconsistency, violation of syntactic construction". For example, "Якщо ти завтра прийдеш... ну, побачимо". Also typical is the use of aposiopesis, which L.R. Bezuhla (2021) interprets as a figure of "expressive syntax that consists in breaking off a statement," that is using the intentional incompleteness of a thought to create intrigue or enhance emotional impact. For example, "Я хотів сказати, проте...";

4) simplifying the syntactic structure. Users often prefer simple sentences to complex ones to convey information as concisely as possible. For example, instead of "Якщо у вас є час, ми можемо зустрітися сьогодні ввечері" they write "Зустрінемося ввечері?" Such abbreviations, although useful, greatly simplify the syntactic structure of the message.

Syntactic variations and agrammatism in online discourse are caused by several factors, firstly, online communication is often fast, and users want to respond to others' messages instantly. This makes communication more dynamic, but reduces attention to grammatical correctness. Second, in messaging environments, messages are often composed impulsively, without careful thought or organisation. Third, conveying mood and emotion becomes more important than adherence to language norms. For example, the use of interjections and abbreviations can be more effective in conveying emotions than complex syntactic structures. Fourth, technological limitations have a major impact. In many messengers and social networks, the limited number of characters in a message encourages shortening of sentences.

The Ukrainian language, like other languages, is adapting to the situation of virtual communication. As a result, agrammatism is becoming a common practice in informal settings, which may raise concerns about compliance with language norms. On the one hand, this is evidence of the dynamism and flexibility of languages in adapting to new communication situations. On the other hand, the frequent use of agrammatism can have a negative impact on language culture, especially among young people who develop their language skills mostly in a virtual environment. Therefore, syntactic diversity in online discourse is a natural phenomenon that reflects the needs of modern society. However, it is important to find a balance between convenience and compliance with language norms to preserve the richness and culture of the Ukrainian language.

The phenomenon of globalisation is leading to significant changes in many areas of life, such as communication, economics, politics, and culture. One of the biggest challenges for languages in the modern world is the need to adapt to new communication situations, especially in the digital environment. The Ukrainian language is no exception and actively interacts with global trends, while preserving its cultural characteristics and uniqueness. English as a global language of international communication prevails in the Internet space. This language

serves as a universal means of communication used by people from different countries who do not speak the same native language. This is reflected in Ukraine as well, as it is used in business, science, technology, and Internet communication. However, the Ukrainian language has responded to this global trend by not only adopting foreign language elements, but also actively adapting to them while preserving its cultural identity. It is also important that the Ukrainian language in the digital environment does not become a mere copy of English, but changes in accordance with its own linguistic structures and norms. This process of adaptation includes borrowing English terms, creating new words, and adapting to Ukrainian phonetics and grammar. For example, English words such as "computer", "Internet", and "startup" are often used as they are, but in the Ukrainian environment they can be adapted to Ukrainian grammatical structures: "startups", "computerization", "online courses".

The process of globalisation, on the one hand, creates new opportunities for the development of languages, and on the other hand, it raises the problem of preserving the cultural uniqueness of the language. Despite global influences, the Ukrainian language actively uses traditional means of expression, such as intonation, lexical items, metaphors, and folk expressions, to create a specific emotional and cultural context. In the context of online communication, it is important to note how Ukrainian users adapt to modern technologies and language practices without losing their cultural identity. Moreover, languages on the Internet are not only adapting to global trends, but are also becoming an important means of cultural expression. This is evidenced by the prevalence of the Ukrainian language on social media, blogs, videos, and other digital platforms. Thanks to these platforms, the Ukrainian language has new opportunities for development and demonstrates its ability to adapt to modern requirements without losing its cultural foundation.

Online communication reflects the flexibility of language and its ability to change. At the same time, these changes are not random or irregular, but are influenced by new technologies and ways of communication. For example, the use of abbreviations, icons, and informal language is becoming more common in online communication. However, these elements can be adapted to the cultural realities of Ukraine, while maintaining their differences from other language zones. The choice of words, modes of expression, and methods of communication all reflect not only individual communication patterns but also the cultural identity of the group. The flexibility of the Ukrainian language and its ability to adapt to new situations make it increasingly capable of meeting the needs of modern users. This applies not only to the use of the latest technical terminology, but also to the language's ability to adapt to the requirements of fast and effective communication in the online environment. In virtual communication, the need to save

time and resources means that language changes such as shortening phrases, using abbreviations and icons help to convey the main idea or emotion as quickly and clearly as possible.

Therefore, globalisation does not destroy but transforms the Ukrainian language, introducing elements of world culture and technology. At the same time, the Ukrainian language retains its cultural identity, actively adapting new forms of expression and communication strategies to its unique traditions. This confirms that the Ukrainian language is able not only to respond to the challenges of globalisation, but also to actively define its place in the modern digital space.

Conclusions

The broad and interdisciplinary nature of the concept of "discourse" makes it difficult to define and classify it clearly. Discourse is always associated with a pragmatic situation, mental processes of communication, cultural and social factors, which are reflected in various types and forms of expression. In particular, electronic discourse, including Internet discourse, reflects the changes caused by digital technologies and creates new ways of communication. Internet discourse is characterised by multimodality, innovative ways of expressing emotions, and the adaptation of language to the needs of the digital environment. This affects the way we speak, enriching the language with icons, abbreviations, numbers, and syntactic variations. At the same time, such communication contributes to the formation of virtual versions of the language that link cultural identity with the practical needs of the global community.

Some of the challenges of Internet discourse, such as agrammatism that simplify language structures, sometimes have a negative impact on language culture. However, these changes reflect the spirit of the times, adapt language systems to modern conditions and contribute to their dynamic development. In general, discourse remains an important tool in communication studies, helping to understand the interaction of language, culture, technology and contributing to the creation of new models of communication in the context of globalisation and information technology.

In social networks, chat rooms, and game servers, where simultaneous communication is possible, syntactic norms are often largely lost. Punctuation marks in virtual messages help to give the text additional semantic significance, and their number corresponds to the intensity of the emotion. The stylistic load of different punctuation marks is not the same. The online environment reflects the wealth of information and events in real life. It reflects the fact that each sub-discourse is open to users and is a complex and constantly evolving organisation. Users are able to shape the information space on the Internet thanks to their technical capabilities. This is emphasised not only by the diversity and multifaceted nature of the network, but also by its effectiveness.

Prospects for further research lie in both improving the theoretical concepts of discourse and in the practical analysis of the impact of digital technologies on language culture and communication strategies. The integration of interdisciplinary approaches and modern analytical methods will provide a deeper and more comprehensive understanding of the phenomenon of discourse in the rapidly developing information society.

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Мовні та соціальні аспекти інтернет-дискурсу: виклики і перспективи

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Анотація. У статті розглянуто поняття дискурсу та його різноманітні типології, які стали предметом міждисциплінарних досліджень. Особливу увагу приділено електронному дискурсу, що охоплює такі підвиди, як комп'ютерний, віртуальний та інтернет-дискурс. Визначено, що розвиток інформаційних технологій значно вплинув на особливості комунікації в цифровому середовищі, сприяючи появі нових форм взаємодії, змінам у мовленнєвих практиках та адаптації природної мови до технологічних умов. Інтернет-дискурс є ключовою формою сучасного спілкування, що поєднує як вербальні, так і невербальні елементи, зокрема емодзі, графічні виділення та звукові фрази. Також розглянуто вплив інтернет-комунікації на мовні стилі, зокрема тенденцію до скорочення висловлювань, використання аббревіатур та впровадження нових виразних засобів. Відзначено роль англійської мови як універсального засобу комунікації у віртуальному просторі, що впливає на мовну ситуацію в Україні. У ході дослідження встановлено, що цифрове середовище сприяє формуванню нових комунікативних стратегій та мовленнєвих норм, які поступово закріплюються у мовній практиці користувачів. Аналіз текстів інтернет-комунікації показав наявність стійких моделей взаємодії, що відрізняються високою контекстуальністю та експресивністю. Було виявлено, що аграматизм, характерний для онлайн-спілкування, не є випадковим явищем, а функціонує як засіб підвищення швидкості та зручності комунікації. Дослідження підтвердило, що інтернет-дискурс відіграє важливу роль у трансформації сучасної мови, впливаючи на норми письмової та усної комунікації. Отримані результати дозволили прогнозувати подальші зміни в мовній поведінці користувачів цифрових платформ, що пов'язані з подальшим розвитком технологій та глобалізаційними процесами.

Ключові слова: дискурс; інтернет-дискурс; комунікація; електронний дискурс; комп'ютерна лінгвістика; мовні зміни; цифрове середовище; результати дослідження



Peculiarities of conducting general visitations in the Kyiv Uniate Metropolis: A review based on acts of church visitations of the 18th century

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Abstract. The relevance of the study is stipulated by the need for an in-depth study of the mechanisms of church governance in the eighteenth-century Kyiv Uniate Metropolis, in particular through the prism of the practice of general visits, which had a significant impact on religious and social life. The purpose of the study was to identify the peculiarities of conducting general visits, their impact on the organisation of religious life and the development of church structures in the Kyiv Uniate Metropolis. The methodological basis of the work was historical, comparative, and sociocultural analysis, which allowed for a systematic study of the phenomenon. The source base consisted of acts of church visitations, protocols, and reports of the eighteenth century. The study found that general visits were aimed at checking the state of churches, parishes, and the activities of the clergy. Visitors carried out a detailed inspection of the material condition of churches, assessed the level of liturgical duties, the state of church documentation, as well as the level of catechesis and morality of parishioners. Considerable attention was paid to discipline among priests and to ensuring proper maintenance of churches and schools. The study also found that the visits contributed to strengthening church discipline and integrating the metropolis into the Catholic world. At the same time, the practice of visits reflected local peculiarities, such as social and cultural differences between regions, which was particularly evident in the Lviv, Lutsk and Polotsk deaneries. The findings underlined the importance of general visits as an instrument of church governance that allowed for the strengthening of religious identity and the adaptation of church-wide norms to the needs of union communities. The practical significance of the work lies in the possibility of using its findings for further study of the history of the Uniate churches, in particular their role in preserving cultural heritage and spiritual life

Keywords: Kyiv Uniate Metropolis; spiritual life; deaneries; diocese; parish; pastoral care

Introduction

The peculiarity of conducting general visits in the Kyiv Uniate Metropolis in the historical context deserves special attention, as this practice played a key role in ensuring unity, organisational efficiency, and compliance with canonical norms in the dispersed communities of the metropolis. General visits were a mechanism that allowed the Church to respond to

internal and external challenges caused by social, political, and religious changes in the Rzeczpospolita. The study of this topic is particularly relevant in light of the current interest in the history of the Uniate Church, the successor to the Ukrainian Greek Catholic Church, and its contribution to the formation of the region's religious identity.

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The institution of general visitations in the Kyiv Uniate Metropolis was formed under the influence of the Tridentine reforms and was later regulated at the Zam-ość Council (1720), adapted to the conditions of the Orthodox-Catholic synthesis characteristic of this church tradition. The organisational structure of the metropolis, with its division into dioceses and deaneries, ensured systematic hierarchical supervision. Bishops and deans were responsible for organizing and conducting inspections that covered the spiritual, administrative and financial aspects of parish life. These visits helped to strengthen discipline among the clergy, improve pastoral care, and maintain communication between central and local church authorities.

Several important trends were observed in the process of conducting general visits. Firstly, the emphasis on catechesis and education of both clergy and laity has become a key aspect that emphasises the need to establish doctrinal orthodoxy. Secondly, increasing attention was paid to the material condition of churches, the interior decoration and equipment of churches and schools, ensuring that the infrastructure met the requirements of liturgical and educational activities. Thirdly, financial and administrative inspections revealed a desire for transparency and efficiency in the management of church property, and also revealed shortcomings and needs that needed to be addressed. For example, when it was discovered that the floor in a church was rotten, or church paintings were worn out, or there was a shortage of priestly vestments.

I. Skochylas (2012) analysed, in particular, the church acts of the general visitations in the Ukrainian-Belarusian dioceses of the Kyiv Union Metropolis. The author noted that the prerequisites for their creation were the regulation and renewal of church institutions, which regulated church life in the Kyiv Union Metropolis during the seventeenth and eighteenth centuries and modernised the entire Union Church, and the existence of diocesan councils of clergy (general congregations) and general visitations.

Y.P. Avvakumov (2016) studied the historical development of the Ukrainian Greek Catholic Church and its impact on contemporary Ukrainian identity. The author emphasised the role of the church in the context of socio-political crises as an intermediary between different religious and national communities. The importance of the church in supporting cultural revival and ensuring stability in difficult historical periods was also highlighted. P. Babie (2023) analysed the canonical origins and status of the Orthodox and Greek Catholic Churches of Ukraine in the context of their historical and contemporary development. The author focused on the relations of these churches with Constantinople and Rome, emphasizing their place in the wider Christian world. Particular attention was paid to the influence of canonical traditions on the contemporary religious and legal

challenges faced by these churches. The study highlighted the complex interaction of historical, political and cultural factors in shaping their identity.

H. Filipova (2021) studied the connection between eulogistic works and Kyivan monasteries in the context of relations between the Hetmanate and the Moscow Kingdom in the early eighteenth century. The author analysed literary sources that reflected the political and cultural interaction of these regions, as well as the role of monasteries in shaping ideological narratives. The study emphasises the use of eulogy literature as a tool for strengthening the positions of the church and state in the context of the growing influence of Muscovy. K. Kostiuchenko (2024) analysed church goldsmithing as a unique phenomenon of Ukrainian culture of the seventeenth and eighteenth centuries. The author examined its artistic features, techniques, and role in religious life, focusing on the relationship between craftsmanship and the spiritual needs of society. The study pointed out the significance of goldsmithing as an important element of cultural heritage that reflected the aesthetic and spiritual ideals of the time.

E. Grin-Piszczek (2023) studied parish chronicles kept in the archives of the State Archives in Przemyśl and analysed their importance as sources for studying local history. The author drew attention to the content diversity of the chronicles, their structure, and documentary value. The study revealed that these materials contribute to a deeper understanding of the religious, social and cultural life of the region in different historical periods. M. Ivaniv (2021) analysed the participation of Ukrainian Greek Catholic bishops in the Second Vatican Council and their contribution to the discussions on the development of the consilium documents. The author examined the influence of this clergy on ecumenical dialogue and identifies their role in shaping the Catholic Church after the Council. The paper also highlighted the interaction between the Eastern rite and the Western tradition, which contributed to the development of interreligious cooperation. A. Pavlyshyn (2021) conducted a study of the inspection of monastery abbots of the Lviv Uniate Diocese in 1724. The author analysed documents related to administrative inspections and evaluation of monasteries, which allowed for a deeper understanding of the state of spiritual life and the organisational structure of the diocese at that time. The paper also highlights the importance of this inspection for improving the management of church institutions and their development in the context of Ukrainian Orthodoxy under the influence of the Union.

Despite considerable scholarly interest in the history of the Kyiv Uniate Metropolis, the topic of the specifics of the general visits remains under-researched, especially in terms of their impact on church unity and identity inherent in the Eastern Catholic Church. The aim of this paper was to highlight the organisational, spiritual and

social aspects of this practice through an analysis of the acts of church visitations. The paper addresses three key tasks: defining the organisational mechanisms for conducting general visits in the context of the Kyiv Uniate Metropolis; analysing the role of these visits in strengthening discipline and unity in church communities; assessment of the impact of the Tridentine reforms on the tradition of visits in the metropolis.

Materials and Methods

The main source material was official reports on visits, inventory documents, clergy correspondence, and other archival materials. A wide range of documents was collected for the study. The following documents were used: *Wizyty dekanatów Berdyczowskiego* (1751), *Wizyta generalna dekanatów Niemierowskiego-Kalnickiego-Zywotowskiego* (1790), *Wizyty generalne dekanatów Fastowskiego, Pawłowskiego* (1746). Reports on general visits are the main source of information about the state of churches (*Acta Visitationis Gnrlis...*, 1784), the moral state of parishioners, the activity of the clergy, and the general development of parishes. The financial aspects of church life were often recorded in various documents, including metric books, which sometimes contained information about the economic situation of parishes, expenses for the maintenance of churches, clergy salaries, and charitable initiatives (*Metric book of...*, 1799). They also made it possible to assess the economic impact of the reforms on local communities. Instructions for the inspectors – provide an idea of the organisational principles that were followed during the inspections (*Dekanat Bialocerkowski*, 1750). In addition, statistical and geographical descriptions of parishes became an important source of information, which allowed for a general description of the territorial organisation of church life. For example, the *Geographical and Statistical Description of Parishes in the Kingdom of Poland* (1796) describes in detail the geographical distribution of parishes, their socio-economic status, and the specifics of the organisation of local spiritual life. The research also took into account the importance of the Union of Brest (1596), which became an important historical context for the further development of the Kyiv Union Metropolis.

The content analysis of archival materials made it possible to systematise information about the state of parishes, the main problems that needed to be solved, and the results of reforms. The visitation reports were analysed to identify recurring themes and problems, such as the condition of churches, clergy support and religious discipline. A comparative analysis revealed regional differences in the conduct of visits between Lviv, Podillia and Volyn.

The critical assessment of the reliability of the sources was carried out using the historical-critical method, which made it possible to identify possible contradictions between official documents and the real-life conditions of parishes. Quantitative analysis was used to

summarise the data on the number of visits conducted and the frequency of discipline violations. An analysis of the frequency of mentions of certain problems in the regions showed that the most common issues were those related to the financial support of parishes. The synchronic and diachronic analysis made it possible to trace the dynamics of changes in the parishes during the study period. The sociological approach was used to analyse the socio-economic factors that influenced the activities of parishes. The interdisciplinary approach, which combined historical, sociological and cultural aspects, allowed for a deeper understanding of the impact of reforms on the development of parishes. This made it possible to analyse not only the religious but also the cultural aspects of the changes in the parishes. All the data obtained were interpreted from the perspective of the historical and organisational approach, which made it possible to summarise the results and form a systematic view of the development of parishes within the metropolis.

Results

Historical and organisational context of general visitations

The tradition of general visits in the Kyiv Uniate Metropolis has its roots in the wider church practice of visitation, a mechanism used by the church to ensure compliance with canonical norms, address pastoral issues, and maintain organisational unity. The concept of church visitation originated in the early Christian Church, becoming more formalised in the Middle Ages. Bishops were instructed to periodically visit parishes within their jurisdiction to assess their spiritual, administrative and financial condition. These visits were seen as an opportunity to enforce discipline, combat heresies, and provide guidance to both clergy and laity.

This practice gained new strength in the post-Reformation period, especially under the influence of the Council of Trent (1545-1563). The Council emphasised the importance of visitations as part of a wider programme of clergy reform. Regular inspections were intended to improve the quality of pastoral care, ensure the proper administration of the sacraments, and eliminate abuses in the Church. These reforms had a profound impact on the traditions of the Uniate Church, including the Kyiv Metropolis, which sought to come closer to the dominant Catholic Church while maintaining its Eastern liturgical and cultural identity.

The Zamość Council, in the spirit of the holy Council of Trent, pays special attention to the questionnaire and the procedure for conducting visits to parish and monastery churches. The external condition of churches and the internal provision of necessary church equipment and vestments: “whether the holy churches are covered or properly provided with vestments and [church] furnishings; whether [the pastors] adhere to what was decided at the provincial council regarding both the internal and external state of the church”. Disciplinary order

in the church: "[the clergy] should supervise whether the people observe the feast days and how often they attend services, whether they observe fasts at the appropriate time: whether there are any blasphemers, blasphemers, ex-communicants, schismatics, and those suspected of divination and superstition, and all this should be reported in writing to the ruling bishop on the eve of the diocesan council in order to prevent such evil" (Cathedrals of the..., 2022).

In the Kyiv Uniate Metropolis, the tradition of general visitations was formed both under the influence of external Catholic influences and internal Orthodox traditions. This dual heritage allowed the Uniate Church to adopt a unique model of visitation that met the specific needs of its communities while adhering to broader church norms. Visitation became a vital tool for maintaining cohesion in the diverse and often geographically dispersed parishes of the metropolis.

In the eighteenth century, the Kyiv Uniate Metropolis covered a large and complex territory, reflecting the political and ecclesiastical dynamics of the Polish-Lithuanian Commonwealth. The metropolis was divided into several eparchies, each headed by a bishop responsible for overseeing the spiritual and administrative affairs of his jurisdiction. The most prominent dioceses were Lviv, Vinnytsia, and Zhytomyr, which represented key centres of church activity and cultural influence. Each diocese was divided into deaneries, smaller administrative units that facilitated local administration and provided direct communication between the bishop and individual parishes. The deans, who were often senior clergymen with extensive experience, played a crucial role in this structure. They were responsible for coordinating pastoral activities, ensuring the implementation of episcopal directives, and organizing general visits to their deaneries (Table 1).

Table 1. Structure of the Kyiv Union Metropolis

Administration level	Description	Main divisions	Leader	Functions
Metropolis	The main administrative centre of the Ukrainian Union Church	Kyiv Metropolis	Metropolitan	1. General leadership of the church. 2. Coordination of dioceses. 3. Representation of the church in relations with the state and other churches.
Dioceses	Territorial divisions of the metropolis, which united several deaneries	1. Lviv. 2. Lutsk. 3. Przemyśl. 4. Kholm'skaya. 5. Pinsk.	Bishop	1. Supervision of the clergy and parishes. 2. Organisation of visitations. 3. Resolving conflicts in parishes. 4. Maintaining diocesan documents.
Deaneries	Subdivisions of dioceses that encompassed several parishes	1. Kyiv Dean's Office. 2. Vinnytsia Deanery.	Dean (protopope)	1. Control over parishes. 2. Preparing reports for the bishop. 3. Organisation of local clergy gatherings.
Parishes	The smallest administrative units that united separate communities of believers	Local churches and parishes	Parish priest	1. Conducting religious services. 2. Spiritual care of the community. 3. Teaching catechism. 4. Registration of marriages, baptisms, and burials.
Monasteries	Centres of spiritual and cultural life	Basilian monasteries	Abbot (abbot, archimandrite)	1. Organisation of monastic life. 2. Performing educational, printing, and missionary functions 3. Maintaining discipline among monks.
Educational institutions	Clergy training and teaching centres for laypeople	Lviv Theological Seminary, Basilian Schools	Rector	1. Training of the clergy. 2. Dissemination of theological knowledge. 3. Education of the laity within the framework of spiritual education.

Source: compiled by the author based on A.N. Andreev & Y.S. Andreeva (2019)

The organisational complexity of the metropolis required a structured approach to general visits. The bishops relied on detailed reports from deans to identify parishes in need of attention and to prioritise specific issues for inspection. This hierarchical structure ensured that the practice of visitation could be carried out systematically, despite the challenges posed by the metropolis' vast size and diverse population. The emergence of general visitation as a distinct church practice can be traced back to the broader history of episcopal governance in the Christian tradition. Early church councils, such as those in the fourth and fifth centuries,

emphasised the importance of bishops exercising careful oversight of their dioceses. This principle was formalised in the medieval period, with the establishment of canonical requirements for visitations (Almes, 2024).

In the context of the Kyiv Uniate Metropolis, the tradition of visitations was deeply influenced by the complex religious and political history of the region. The Union of Brest (1596), which established the Uniate Church, aimed to bridge the theological and liturgical gap between Eastern Orthodoxy and the Roman Catholic Church. This union brought new administrative and spiritual responsibilities, including the need to integrate the practice of

general visitation into the administration of the metropolis. The Uniate Church's adoption of the practice of visitation reflected its desire to maintain both internal discipline and external legitimacy. The general visits served as a means of demonstrating the Church's commitment to Catholic reforms while addressing the specific pastoral concerns of its Eastern Rite communities. This practice was especially important in regions where religious tensions and political instability threatened to undermine the Church's authority. The reforms of the Council of Trent had an impact on the organisation of visitations in the Kyiv Uniate Metropolis. As part of a broader programme to standardise and strengthen church governance, the Council issued detailed instructions for episcopal visits. These guidelines emphasised the importance of regular and thorough inspections of parishes, with a focus on promoting doctrinal orthodoxy, improving clergy education, and combating abuses such as absenteeism and financial mismanagement (Veremeienko, 2023).

In the Kyiv Uniate Metropolis, these Tridentine principles were adapted to the context of the Uniate Church. Bishops were required to visit every parish within their eparchy at least once every few years, with special attention to remote or underserved communities. The visits were carefully planned and documented, often involving a combination of liturgical ceremonies, pastoral counselling and administrative inspections. The influence of the Council of Trent was also evident in the special attention paid to education and catechesis during the general visits. Bishops and deans used these occasions to assess the theological knowledge of the clergy, to give guidance on proper liturgical practice, and to distribute catechetical materials to parishioners. This focus on education reflected the Council's broader goal of raising a well-informed and spiritually engaged laity.

The division of the Kyiv Uniate Metropolis into eparchies and deaneries was a key organisational feature that facilitated the practice of general visitations. Each eparchy functioned as an autonomous administrative unit with its own bishop and cathedral administration. The dioceses of Lviv, Vinnytsia, and Zhytomyr were particularly important, serving as centres of church activity and cultural exchange. In each eparchy, deaneries provided an intermediate level of management that allowed for more localised oversight. Deans were responsible for coordinating the activities of individual parishes, ensuring compliance with episcopal directives, and organizing visits on behalf of the bishop. This division of responsibilities allowed the metropolis to maintain a high level of organisational efficiency, despite the challenges posed by its large and often inaccessible territory (Sysyn, 2023).

Deanships also played a crucial role in establishing communication between the central and local levels of church administration. Deans acted as intermediaries, passing information from bishops to parish priests and vice versa. This hierarchical structure ensured that the practice of general visits could be carried out

effectively and that each level of the church contributed to the overall success of the initiative. The Metropolitan, as the head of the Kyiv Uniate Metropolis, played a key role in overseeing the practice of general visits. While the day-to-day responsibility for conducting visits rested with individual bishops and deans, the Metropolitan provided overall strategic direction and ensured that the practice was consistent with the broader goals of the Uniate Church. The metropolitan also served as a source of guidance and support for the bishops, offering advice on complex pastoral and administrative issues. The deans, on the other hand, were the main organisers of the general visits at the local level. They were responsible for planning the logistics of each visit, coordinating the participation of clergy and laity, and compiling detailed reports on the state of the parishes in their deaneries. These reports helped the bishops to identify problematic issues and set priorities during the visits.

The tradition of general visits in the Kyiv Uniate Metropolis developed as a response to historical and ecclesiastical events. Rooted in early Christian practice, shaped by the reforms of the Council of Trent and regulated by the Council of Zamość, visits served as a vital tool for maintaining discipline, promoting education, and strengthening unity within the Church. The hierarchical structure of the metropolis, with its division into eparchies and deaneries, provided an effective framework for organizing these visits, and the leadership of the metropolitan and deans ensured their successful implementation. Together, these elements underscore the importance of general visits as a cornerstone of church governance in the Kyiv Uniate Metropolis.

The implementation of general visitations in the eighteenth century faced numerous challenges that made it difficult to achieve their goals. For example, the large geographical size of the Kyiv Uniate Metropolis and poor roads created difficulties for bishops and deans when travelling to remote parishes. An additional problem was limited financial resources, which made it difficult to provide transport, maintain escorts, and organise events on the ground. Another challenge was the heterogeneity of the religious environment. Some parishioners, especially in regions with strong Orthodox or Protestant influence, were suspicious of the visits or even openly opposed to the bishops. There were also priests who disregarded canonical norms or resisted disciplinary measures, making it difficult to establish unity. To overcome these challenges, deans and bishops developed detailed itineraries, held preparatory meetings with local clergy, and involved the laity in organizing the visits. This approach helped to mitigate resistance and helped to establish the Church's authority.

The dynamics between the Polish-Lithuanian Commonwealth and the Uniate Church had a significant impact on the conduct of the visits. Political instability, including military conflicts and the growing influence of the Orthodox gentry, created obstacles to the

implementation of church reforms. For example, some secular magnates, being patrons of Orthodox communities, blocked attempts by bishops to conduct visits to their territories. On the other hand, the support of the church by the royal authorities allowed the bishops to use the visits to promote reform initiatives that strengthened both the spiritual and administrative order. Political stability in certain regions contributed to the active implementation of educational programmes, which during the visits emphasised the catechesis of the laity and the training of priests. The laity played an important but not always predictable role during the visits. On the one hand, they supported the activities by helping to organise meetings, provide facilities for ceremonies, and financially support projects. On the other hand, there have been cases where parishioners have reacted negatively to inspections, perceiving them as an attempt to restrict local traditions or abuse of power.

Procedure for conducting general visitations

Preparations for the General Visitation in the Kyiv Uniate Metropolis were a thorough process, reflecting the central role of these inspections in church governance. The preparatory phase began with the formation of a commission of visitors, which usually included high-ranking clergy and sometimes laymen with expertise in administrative or financial matters. The bishop's mandate authorised this commission, ensuring that its activities were in line with canonical norms and local church priorities (Levytskyy, 2020).

To facilitate effective visits, detailed documentation was prepared. This included preliminary announcements made to the clergy and parishioners of the target deaneries, indicating the dates and expected procedures of the visit. These announcements were intended to promote transparency and cooperation. In addition, visitation teams received instructions outlining key areas of focus, such as spiritual, administrative and financial aspects of parish life. Preparatory requirements included ensuring that appropriate documentation was available. Parish priests were tasked with organizing documentation, including baptismal, marriage and death registers, financial reports, land records and an inventory of church property. These records formed the basis for the thorough assessments during the visit. In addition, special attention was paid to the preparation of reports on the condition of church buildings, schools, and other religious institutions in each parish (Urakina, 2022).

The process of conducting the general visits was structured into several stages, each of which focused on certain aspects of church life. These stages ensured comprehensive oversight and accountability. The first stage was the initial meeting and liturgical opening: visits began with a formal meeting of parish representatives, including clergy and laity, often preceded by a liturgical service. This opening ceremony emphasised the spiritual basis of the visitation process – the inspection

of church infrastructure: the visiting committee conducted an in-depth survey of the physical condition of the church property. Churches were assessed for structural integrity, aesthetic appearance, and compliance with liturgical standards. Particular attention was paid to altars, sacred vessels and relics to ensure that they met the established standards. Schools and monasteries within the parish were also inspected, with a focus on the adequacy of facilities and adherence to Uniate educational and spiritual principles (Cherkes *et al.*, 2019).

The moral and spiritual vitality of the parish community was the focus of attention. The morals and behaviour of priests were scrutinised, with particular attention to their adherence to priestly duties, pastoral care and personal discipline (Wizyty dekanatów Berdyczowskiego, 1751). The education of the parishioners was also assessed, with a focus on catechesis, participation in the sacraments, and moral behaviour in the community. Financial and administrative records, financial reports and land documents were scrutinised to ensure good governance and transparency. Visitors verified that parish funds were distributed in accordance with church and community needs, drawing attention to discrepancies or irregularities as necessary. Land records were reviewed to confirm legal ownership and proper use, preventing encroachment or mismanagement of land. Interaction with local authorities and reporting. Finally, the commission spoke to local parishioners to gather first-hand information about parish life. At this stage, the main problems or areas requiring intervention were often identified. The visit concluded with a comprehensive report that summarised the findings and recommended corrective actions where necessary (Bila, 2021).

The methodology and focus of the overall visits in the Lviv, Vinnytsia, and Zhytomyr deans' offices differed due to differences in geographical, cultural and socio-economic contexts. These differences emphasised the adaptability of the visit process to local conditions. Lviv Deanery: In the Lviv Deanery, visits often highlighted theological education and liturgical relevance. This region, which was a cultural and intellectual centre, had a significant number of seminaries, monasteries, and schools. The inspections included a detailed analysis of the curricula in the seminaries, the quality of theological literature, and the level of training of the clergy. Particular emphasis was placed on observance of canonical norms during services. The financial inspections in Lviv were systematic in nature, including the distribution of resources between rich and less wealthy parishes. For example, parishes with high incomes were required to support neighbouring communities that had limited opportunities for self-sufficiency (Zielecka-Mikołajczyk, 2022).

The Vinnytsia deanery, unlike Lviv, was rural and agrarian in nature, which influenced the priorities of the general visits. Here, considerable attention was paid to the condition of church buildings and land records, given the dependence on agricultural income. The visiting

commission paid particular attention to land disputes and the fair use of parish resources to support community projects. Particular attention was paid to catechesis. Due to the low level of formal education among the population, new approaches to teaching the basics of the faith were developed, including individual conversations with parishioners and the creation of educational materials in accessible language. In addition, the visits here included a review of community involvement in the maintenance of church buildings. The Zhytomyr Deanery presented unique challenges due to its socio-economic diversity and mixed religious demographics. The priority of the visits to this region was to promote unity among the union parishes and to overcome tensions with other religious groups. Inspections of schools and monasteries were aimed at strengthening the distinctive identity of the Uniate Church, ensuring that these institutions serve as bastions of faith in the face of potential external influences.

The geographical location and socio-economic status of parishes greatly influenced the conduct of general visits. Rural parishes, which often faced limited resources, needed more support and intervention during the visits (Geographical and Statistical..., 1796). These visits often resulted in recommendations for infrastructure repairs, financial assistance, and strengthening catechetical programmes. Urban parishes, on the other hand, tended to have stronger administrative and financial structures. Visits in these settings focused on maintaining high standards of liturgical practice and overcoming the challenges of managing large and diverse communities. The socio-economic status of parishes also influenced the nature of the financial audits, with wealthier parishes being subject to stricter scrutiny to ensure that resources were distributed equitably (Siluk & Vob, 2019).

General visits in the Kyiv Uniate Metropolis were the cornerstone of church oversight, encompassing a thorough examination of the spiritual, administrative and financial aspects of parish life. Preparations included detailed planning, the formation of a commission to conduct the visits and the organisation of the necessary documentation. The process of the visitation was methodical and included liturgical celebrations, an overview of the infrastructure, an assessment of religious life, and financial analysis. Regional differences influenced the visits: deaneries such as Lviv, Vinnytsia, and Zhytomyr had different priorities and challenges. These differences emphasised the adaptability of the visitation process to different local contexts. Ultimately, the general visits served as an important mechanism for maintaining the integrity, unity, and vitality of the Uniate Church in the Kyiv Metropolis, promoting accountability and spiritual renewal of its diverse parishes.

Acts of general visitations as a historical source

The acts of general visits of the eighteenth-century Kyiv Union Metropolis are an important source for

understanding the ecclesiastical, social, and cultural history of the region. These documents, which were the result of systematic inspections conducted by church authorities, provide a structured and detailed account of the state of parishes, clergy, and lay communities in the dioceses of the Uniate Church. The reports of the general visits were methodically structured, allowing the church authorities to document a wide range of information. The standard act was divided into sections dealing with key areas, property status in this section, the material resources of the parish, including land holdings, sources of income, movable and immovable property, are described in detail (Fig. 1). Particular attention was paid to the condition of church buildings, the presence, and condition of sacred objects, and the care of cemeteries. As for the spiritual state, the documents recorded the quality of liturgical life and the observance of religious practices by clergy and parishioners. This included the frequency of worship, the availability of the sacraments, and adherence to the liturgical calendar. On the issue of education, the acts often assessed the educational level of both clergy and laity. The clergy were assessed for their theological knowledge and ability to instruct parishioners, while the literacy level of parishioners was recorded as an indicator of the broader education of the community.

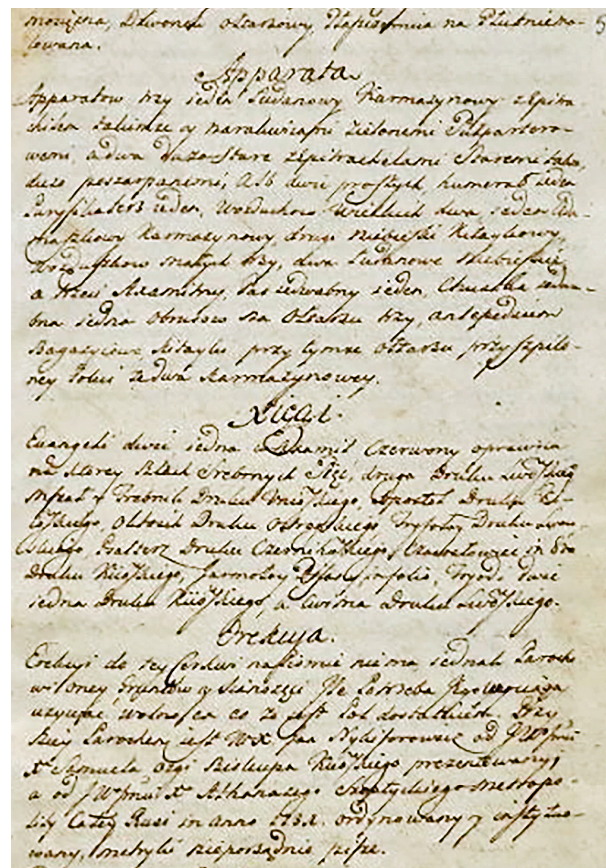


Figure 1. Act of visitation of the Fastiv Deanery
Source: Wizyty generalne dekanatów Fastowskiego, Pawłowskiego (1746)



The language of these acts was mostly Latin, with occasional entries in Polish or Ukrainian. The style was official and administrative, characterised by concise descriptions and an emphasis on the presentation of facts. The acts of visitation reflected the comprehensive functioning of the church as a spiritual and social institution. They highlighted the material and spiritual well-being of parishes and provided insight into the lives of clergy and parishioners. Among the key reflections were the condition of church buildings and material resources, with some acts showing the poor condition of church buildings due to insufficient funding or natural deterioration. These sections highlighted the economic problems faced by parishes and their dependence on local benefactors or external funding. The level of education of clergy and parishioners: The acts documented a significant difference in educational standards (Dekanat Białocerkowski, 1750). Some clergy demonstrated strong theological training, while others lacked training, which affected their ability to serve effectively. Literacy levels varied widely among parishioners, with urban areas having better literacy rates than rural areas. The documents recorded the economic activities of the parishioners, such as agriculture, trade, and crafts. These details provided a broader picture of the socio-economic environment, including patterns of wealth distribution and relationships between parishes and surrounding communities (Avvakumov, 2022).

Although the structure and content of the visitation reports in the different eparchies had common features, there were also local differences. The commonality was that all acts were drawn up in a standardised format to ensure consistency in documentation. This uniformity allowed for effective comparison between parishes and dioceses. All acts emphasised the need to observe proper liturgical practices and to provide adequate resources for the church. Local differences often arose from regional socio-economic conditions and local traditions. For example, parishes in wealthier regions (mostly urban) had better maintained churches and higher levels of clergy education, while parishes in poorer regions struggled with insufficient resources and lower literacy rates. In addition, language preferences in documentation varied, reflecting the influence of the local vernacular (Malafichuk, 2019).

The language and style of writing acts reflected their administrative purpose. Latin prevailed as the language of church documentation, although local languages such as Polish and Ukrainian appeared in annotations or additional comments. The writing style was precise, with an emphasis on clarity and brevity to facilitate administrative review. The vital records served as a mirror of the broader socio-political landscape of the 18th century. Key highlights included social change: the acts documented the changing demographic composition of parishes, including trends in urbanisation and migration. These changes affected the composition

of communities and the resources available to parishes. The Uniate Church operated in a complex political environment, influenced by the Rzeczpospolita authorities and later by Russian and Austrian authorities. Acts often reveal problems related to political interference, taxation policies, and shifting loyalties among parishioners (Stetsyk, 2019).

Thus, the acts of general visits of the Kyiv Uniate Metropolis are a rich historical source that records the material, spiritual, and social aspects of parish life in the 18th century. Their structured format and detailed content reveal the condition of church buildings, the educational status of clergy and parishioners, and the socio-economic dynamics of communities. While the commonality of the structure facilitated a unified administrative approach, local differences highlighted the diverse realities faced by parishes throughout the metropolis. Written in a formal and concise style, these acts not only recorded the state of the church but also reflected the broader social and political changes of the era, offering invaluable information for modern historical research.

The acts of general visitations, drawn up by bishops and their appointed commissions, were formally intended to provide an impartial overview of the state of each parish. However, there were factors that could affect the objectivity of these documents. The visits took place in a difficult political situation in the Rzeczpospolita and were dominated by patronage relations. Some magnates who were of Orthodox origin or supported other denominations tried to weaken the Uniate Church and thus could have prevented thorough inspections. In contrast, the Catholic royal authorities encouraged the visitations as a means of implementing the Tridentine reforms, and bishops had an incentive to demonstrate the success of these reforms in their dioceses. The visitors themselves (deans or appointed clerics) often belonged to the local clergy, so they were not always interested in disclosing in detail problems related to financial or moral irregularities, especially if they concerned high-ranking officials (Wizyta generalna dekanatow..., 1790). The acts of visitation also reflected the interests of the church leadership, which sought to preserve the canonical order and confirm its authority. Reporting documents, written mostly in Latin with Polish or Ukrainian fragments, were intended to demonstrate compliance with the requirements of the Council of Trent, and thus sometimes portrayed the situation in a more positive light or avoided controversial topics. All of this indicated a possible selectivity in the coverage of the facts and emphasised the need for a critical approach to the analysis of the acts.

Many parishes lacked funding, which resulted in the poor condition of church buildings, limited ability to maintain support staff, and difficulties in carrying out repairs. There were reports of some priests disregarding canonical regulations, non-compliance with mandatory services, problems with financial transparency, and periodic conflicts with the laity

(Acta Visitationis Gnrlis..., 1784). In complex political regions with predominant Orthodox or Protestant influence, inspection commissions faced scepticism about their authority, which made inspections difficult. Trends in the different deans' offices showed significant differences, driven by both socio-economic and cultural factors. In the Lviv Deanery, the visitors mostly found an adequate level of theological education of the clergy and the systematic implementation of liturgical reforms. However, despite the large number of educational institutions and seminaries, not all parish communities had sufficient financial resources to distribute educational initiatives evenly. In the Vinnytsia deanery, which was predominantly agrarian in nature, land issues were particularly acute. Disputes often arose between parishes and secular owners over the boundaries of their property, and there was a lack of funds for the maintenance of churches and schools due to dependence on agricultural income (Metric book of..., 1799).

The Zhytomyr deanery was distinguished by a diversity of religious denominations, so the visitors had to establish contacts with communities that practised other rites. There were cases of conflicts related to the lack of clear jurisdictional boundaries, but there were also noticeable trends towards cooperation in solving common administrative problems. The emphasis on catechesis remained common to all deaneries, with visits systematically checking the level of theological knowledge of parishioners and methods of teaching the basics of faith.

Discussion

The results obtained indicate the important role of general visits in ensuring effective governance, preserving unity and maintaining discipline in the Kyiv Uniate Metropolis. The analysis demonstrated that this practice was not only an administrative tool, but also an important spiritual mechanism that helped to adapt Western reforms to Eastern traditions. The assessment of various aspects of parish life, from education to financial management, allowed not only to identify problems but also to develop recommendations for their solution. Regional differences in the focus of the visits, in particular between the Lviv, Vinnytsia and Zhytomyr deaneries, highlight the adaptability of this practice to socio-economic and cultural specificities. Thus, the general visits have become a key element in strengthening the institutional capacity of the Uniate Church, contributing to its legitimacy in the face of religious and political tensions.

M. Radwan (2004) published protocols of acts of general visits to parish churches of Zhytomyr, Bratslav, Pryluky deaneries of Vinnytsia district of the Kyiv Metropolitan Archeparchy of the Russian Catholic Church. The publication of M. Radwan's acts of visitation on pp. 440-666 contains the texts of the visitation protocols of the Russian Catholic parishes of the Bratslav deanery (March-June 1785). The same volume also contains the

visitation protocols of the Zhytomyr, Chudniv, and Pryluky deaneries. This is actually the first large-scale publication of the visitation protocols of the Uniate parishes of Right-Bank Ukraine from fonds 178 of the State Archives of Zhytomyr Oblast (Zinchenko & Petrenko, 2023).

I. Almes (2024) focused on the interaction between the Catholic clergy, Uniate hierarchs, and the Apostolic Nuncio in the process of preparing the agenda of the Zamość Council. The author emphasised the importance of compromises and cooperation between the parties, which contributed to the successful agreement of the Council's issues. The study suggests that this cooperation was often accompanied by pressure on the Uniate clergy and restrictions on their autonomy. While I. Almes positively assessed the role of the nuncio in creating a common agenda, this study highlights the imbalance of power between the denominations, which had a negative impact on local church administration. While both papers agree on the importance of the council as an instrument of reform, this paper emphasises that these reforms did not always take into account the interests of the union church, leading to conflicts at the local level. Thus, it is argued that cooperation within the framework of the council had not only positive aspects but also hidden problems.

S. Kagamlyk (2020) highlighted the intellectual interests of the Ukrainian church elite of the eighteenth century through the analysis of book collections that reflected the spiritual and educational trends of the time. The author focused on the importance of the educational component in the activities of the clergy and their interest in literature of a religious, historical, and philosophical nature. The study by S. Kagamlyk is consistent with the general provisions of this work regarding the importance of the clergy's education and their participation in cultural and educational processes. However, the interpretation of the role of reading is different: while S. Kagamlyk's work emphasised the development of intellectual potential through engagement in reading, the analysis of the acts of visitation in this work focused more on the practical aspects of organizing the activities of clergy and administrative control. This discrepancy is explained by different approaches to the study of sources: S. Kagamlyk's work focuses mainly on book registers, while the work on general visitations focuses on administrative and religious documents. Thus, both works complement each other, creating a holistic view of the educational and administrative aspects of church life.

C.G. Murphy (2021) and A. Miller (2024) highlighted the impact of the Rzeczpospolita's partitions on the development and functioning of the Uniate Church, emphasizing the complexity of its position between different state entities. The authors focus on the political aspects that influenced the governance and organisation of the church, as well as its ability to maintain autonomy in the face of political pressure. Compared to the present study, C.G. Murphy's work is consistent

with the statement about the importance of external circumstances for the church. However, the differences lie in the interpretation of administrative processes. While the researchers point out the external influence of politics on church administration, the work on general visits focuses on internal mechanisms of control and adaptation of the clergy to the conditions created by these political factors. This discrepancy is explained by the different emphases of the studies: C.G. Murphy and A. Miller analysed the political context, while the work on general visits is based on the practical aspects of church administration.

S. Nabywaniec (2022) highlighted the activities of the Zamość Provincial Council of the Russian Church, focusing on its impact on reforming church administration, strengthening canonical norms, and unifying rites. The author emphasises the key role of the Council in strengthening the identity of the Russian Uniate Church and its integration into the structures of the Polish-Lithuanian Commonwealth. The study confirms the significance of councils as important tools for reforming church life, in particular, for strengthening discipline and administration. However, unlike S. Nabywaniec, the present work draws attention to the fact that the implementation of the decisions of the Council of Zamość in the Kyiv Metropolis was significantly complicated by local political and social circumstances, such as resistance from the Orthodox population and limited church resources. Thus, while both works agree on the significance of the decisions of the Council of Zamość for the Russian Church, this paper emphasises the limited effectiveness of these decisions in the context of the Kyiv Uniate Metropolis due to the specific regional conditions.

D. Stern (2021) examined the cultural and religious context of the Greek Catholic Church in the Polish-Lithuanian Commonwealth, in particular the formation of the geography of grace associated with the cult of the Virgin Mary. The study mutually agrees with the conclusions presented in this article that church visits were not only an instrument of control, but also a means of disseminating spiritual and cultural values. At the same time, D. Stern paid more attention to the role of Marian cults in the creation of religious identity, while the study of the visits of the Kyiv Uniate Metropolis focused on administrative aspects and practical influence on church life. Differences in approaches are due to the specifics of the sources: D. Stern used materials that reflect spiritual practices, while the acts of visitation cover administrative activities to a greater extent. This difference in focus contributes to a more comprehensive understanding of the role of the Church in shaping the sociocultural environment of the region.

J. Kulska (2022) considered in her study the Catholic Church as an active participant in political processes, focusing on its role in shaping national identity and integrating social groups. The author emphasised the impor-

tance of interaction between the Church and the state in the context of ensuring stability and spreading the influence of the Catholic Church at the local level. This paper agrees that the church played a key role in shaping social order and cultural integration. However, in contrast to J. Kulska's approach, the study of the Kyiv Metropolis focuses on the difficulties of adapting Catholic models of governance in a multi-confessional environment and political contradictions of the Polish-Lithuanian Commonwealth. Thus, both works agree on the importance of religious structure for maintaining stability, but this study highlights the specificity of regional obstacles that made it difficult to implement union norms, especially in the Kyiv Metropolis, due to cultural and confessional heterogeneity.

K. Radny (2023) explored the conflict between Roman administrative influences and Greek liturgical traditions in the Uniate Church at the end of the eighteenth century. The author noted that general visits were an important tool for overcoming internal differences in the church structure, in particular for maintaining unity between different church practices. K. Radny agreed that administrative control and regulation played a key role in resolving contradictions within the church, but emphasised that external pressure from Rome often made internal reforms difficult. In contrast, the visitation study pointed out that it was regional initiatives and the role of local clergy that contributed to more effective implementation of change. This difference in approach can be explained by different sources: K. Radny focused on the macro-level of historical processes and the influence of global religious institutions, while the acts of visitation reveal the micro-level of interaction between clergy and parishes. Both studies, however, confirm the importance of maintaining a balance between external influence and local traditions for the stable functioning of the Uniate Church.

Conclusions

The study confirmed that general visitations in the Kyiv Uniate Metropolis of the 18th century became a key instrument for adapting Catholic reforms to local conditions. These measures, conducted under the influence of the decisions of the Council of Trent and later regulated by the Zamość Synod, aimed to strengthen discipline among the clergy, reinforce church organisation, and deepen the religious consciousness of the laity. Archival materials indicate that the visitations encompassed both administrative and spiritual aspects of church life, allowing for an assessment of parish conditions and the identification of issues requiring resolution. Particular attention during the visitations was given to the educational level of priests. It was established that in many cases, clergy members had insufficient training, negatively affecting the quality of liturgy and pastoral activities. A significant element of the general visitations was ensuring the proper maintenance of church property. Analysis of

documents suggests that priests often faced difficulties in managing material resources, which could lead to the deterioration of church buildings and a lack of necessary inventory. Within the framework of the visitations, an inventory of property was conducted, parish needs were identified, and recommendations for more effective resource management were formulated. This contributed not only to the preservation of church structures, interior decorations, and liturgical equipment but also to improved conditions for conducting religious services. At the same time, conflicts frequently arose between the clergy and the laity, often driven by socio-economic differences or differing expectations of church life. The successful conduct of inspections depended on cooperation with the local administration, which could either facilitate or complicate the implementation of church initiatives. This interaction underscored the significance of the Church not only as a spiritual institution but also as a social one. Through such inspections, the unity of the Uniate community was strengthened, and ties with the Catholic world were reinforced, playing a crucial role in shaping regional identity. The role of the metropolitan and deans in the implementation of the visits is worth noting. Their activities included coordinating the work of church structures, resolving conflicts, and assessing the compliance of local practices with church-wide standards. The visits became an effective means of monitoring compliance with the norms established

by the Catholic reforms, and at the same time created conditions for the development of church governance.

The study had several objective limitations due to the availability and quality of sources. A significant part of the records of visits were written in Latin or Polish, which required additional time for their translation and interpretation. Some testimonies were subjective in nature, as they were described from the perspective of church hierarchy, which could distort the real picture of life in the parishes. In addition, the geographical fragmentation of the Kyiv Metropolis and the heterogeneity of its socio-economic development made it difficult to generalise the results. Based on the data collected, it can be concluded that a deeper analysis of the regional peculiarities of reforms within the Kyiv Metropolis is needed. Of additional interest is the study of the socio-economic context that influenced the success of the reforms, as well as the role of the laity in strengthening the position of the Uniate Church.

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Особливість проведення генеральних візитацій у Київській унійній митрополії: огляд на основі актів церковних візитацій XVIII століття

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Анотація. Актуальність дослідження зумовлена необхідністю глибокого вивчення механізмів церковного управління в Київській унійній митрополії XVIII століття, зокрема через призму практики генеральних візитацій, що мала значний вплив на релігійне та суспільне життя. Мета дослідження полягала у виявленні особливостей проведення генеральних візитацій, їхнього впливу на організацію релігійного життя та розвиток церковних структур у Київській унійній митрополії. Методологічну основу роботи становили історичний, порівняльний та соціокультурний аналіз, що дозволило системно дослідити обраний феномен. Джерельну базу становили акти церковних візитацій, протоколи та звіти XVIII століття. У ході дослідження виявлено, що генеральні візитації мали на меті перевірку стану церков, парафій та діяльності духовенства. Візитатори здійснювали детальний огляд матеріального стану храмів, оцінювали рівень виконання літургійних обов'язків, стан церковної документації, а також рівень катехизації та моральності парафіян. Значну увагу приділяли дисципліні серед священників, забезпеченню належного утримання храмів і шкіл. Дослідження також виявило, що візитації сприяли зміцненню церковної дисципліни та інтеграції митрополії у католицький світ. Водночас, практика візитацій відображала місцеві особливості, такі як соціальні та культурні відмінності між регіонами, що особливо простежувалося у Львівському, Луцькому та Полоцькому деканатах. Отримані результати підкреслили важливість генеральних візитацій як інструменту церковного управління, що дозволяв зміцнювати релігійну ідентичність та адаптувати загальноцерковні норми до потреб унійних громад. Практичне значення роботи полягає у можливості використання її висновків для подальшого вивчення історії унійних церков, зокрема їхньої ролі у збереженні культурної спадщини та духовного життя.

Ключові слова: Київська унійна митрополія; духовне життя; деканати; єпархія; парафія; душпастирська опіка



Narratives of appreciation and depreciation shaped by memes in authors' publications in mass media of Poland and Ukraine during crisis periods

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Abstract. Memes, as complex multimodal units, and the narratives they shape – which influence public opinion on current real-world issues – represent a relevant yet under-researched topic. This article presents the results of an analysis of one of these aspects: the role of memes in shaping narratives of appreciation and depreciation in Polish and Ukrainian media publications during the pandemic and the full-scale Russian invasion of Ukraine. To achieve this aim, thematic, content, discourse, and narrative analyses were employed. The materials analysed were publications that appeared in *Rzeczpospolita*, *Wiadomości*, *Fakt*, *Rubryka*, *Dyvohtiad* (5 Channel), and *Bukvy* from December 2019 to December 2023. The selection of media outlets was based on criteria such as meme themes and the positioning of the publication within the information space. The first criterion recognises that the thematic representation of memes in these publications is not comprehensive – that is, it does not reflect the full thematic range presented in the media during this period. Instead, selected articles were analysed from sources that illustrate differing editorial approaches, particularly regarding the use of memes in journalistic content. It was found that, on the one hand, memes are used by authors to directly or indirectly evaluate the actions of politicians, anti-vaxxers, clergy, celebrities, and the general public amid pandemic-related uncertainty; to comment on various events in public life; and to highlight contrasts such as “us vs. them” or “hostile vs. friendly” within contexts of information warfare. On the other hand, memes may also serve as evaluative responses by the characters in the publication or those interviewed, as news hooks, or as events requiring description and analysis in their own right. Interpreting such evaluative elements is complicated by the fact that journalistic texts across various genres form a multi-level system with numerous intertextual connections. The results of this study can be used for academically grounded analysis of trends in journalistic practice – particularly in teaching-related disciplines – and by journalists themselves, for instance, as a tool for audience engagement and retention

Keywords: journalism; narrative; stereotype; we-they; metatext; intertextuality

Introduction

Technological advancements are driving changes in information dissemination processes, which undoubtedly affect all stages of journalistic work, including the selection and verification of facts, the preparation of materials for publication, audience engagement, and related tasks. The diverse use of memes in journalistic texts is one of the manifestations of these trends towards

updating the creative toolkit of professional media. However, it should be stated that this aspect of journalistic creativity remains under-researched, as memes are predominantly perceived as attributes of social media culture and, accordingly, are studied within this context.

In view of this, the study of various aspects of meme functioning in journalistic texts becomes increasingly

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relevant, both theoretically and practically. On the one hand, investigating this issue makes it possible to identify and describe trends in the development of journalistic creativity. On the other hand, it enables the collection and systematisation of information on the evolving toolkit of professional media, facilitating the implementation of best practices in editorial work without compromising journalistic standards.

B. Synchak (2021) noted that the ability of social media to construct a subjective reality that the audience may perceive as objective has an impact on journalistic standards. O. Zhuravska (2024) observed that examples of meme usage in journalistic publications demonstrate these trends, which, to some extent, contradict the standardised journalistic commitment to objective information reporting. At the same time, memes actively influence the shaping of public opinion and often draw society's attention to issues that, for various reasons, are avoided by mainstream media. M. Wójcicka (2022) noted: "A meme is a text in which the use of semantically complementary elements – images and words – aims, for example, to ridicule the words, behaviour, attitudes, and values of the meme's characters, and thus influence public opinion (the aim is to persuade)".

Various aspects of meme functioning as an Internet genre are the subject of active scholarly inquiry, particularly in the context of the pandemic. Researchers generally regard memes as components of the culture of this period and propose diverse approaches to their classification, functions, and narratives. For instance, E. Głażewska *et al.* (2023), adopting an interdisciplinary perspective, analyse pandemic-era humour, paying particular attention to memes as an essential element of Internet culture. A notable strength of this study is the use of extensive empirical material, which enables the formation of a comprehensive view of meme production in the Polish cultural space during the pandemic. A. Soćko-Mucha (2023) likewise examines Polish-language jokes from the pandemic period, devoting considerable attention to memes. However, the author does not propose a classification of memes, focusing primarily on their humorous function.

From the perspective of meme classification, the works of C. de Saint Laurent *et al.* (2021) are of particular interest. The authors investigated political narratives shaped by memes in the online space during the pandemic, identifying, in particular, five narrative lines that construct protests against the incompetence of politicians. Pandemic meme narratives in the Polish online environment are also analysed by R. Norstrom & P. Sarna (2021). The authors identified types of popular protagonists, the thematic focus of memes, as well as a scheme of meme narration. Based on pandemic-related material, M. Dynel (2021) explored the phenomenon of meme reposting, noting that such reposts often distort the original intent of the meme's creator. War-time memes have also become the focus of increased

scholarly attention, as demonstrated in detail by Ch. Peters & S. Allan (2022). The authors showed how memes serve as tools of aggression and contribute to the normalisation of hate narratives.

A cultural studies approach to the analysis of Ukrainian memes produced during the full-scale Russian invasion is presented in the work of L. Bilaniuk (2023). The author provided a broad overview of memes from this period, creating a context for understanding them among English-speaking audiences and emphasising the significance of memes for Ukrainians as a tool of psychological and informational resistance to the enemy. A similar approach, but aimed at Polish-speaking readers, is taken in the study by A. Majdzińska-Koczołowicz & J. Ostanina-Olszewska (2023). The authors examined memes primarily from the standpoint of cognitive linguistics, considering them as a distinct tool of communication. It should be noted that these publications are significant primarily because they document and describe clusters of thematic memes from the period of the pandemic and the fullscale Russian invasion of Ukraine, as well as their various functions in the information space – mainly in social media.

These studies primarily contribute to meme theory, which is undoubtedly a positive trend, but they do not address all aspects of meme functioning, particularly in journalistic texts. As has been demonstrated, memes constitute an important functional component of journalistic texts, at least during the period from December 2019 to April 2024 (Zhuravska, 2024). In journalistic texts, they may serve as a newsworthy event, illustration, element of a digest, form of assessment or commentary, among other roles. In this light, the importance of further research on meme functionality in journalistic texts is beyond doubt.

However, at least within Ukrainian academic discourse, there appears to be a certain narrowing in the study of memes. In particular, authors tend to focus on examining the meme as a tool of information confrontation, while providing limited detail on data collection and analysis methods – an omission that complicates the understanding of their research methodology. A certain terminological inconsistency is also notable. For instance, in the study by K. Sizova *et al.* (2024), the authors rely on a definition of the meme proposed by L. Brovko. However, the cited source is not an academic publication, but a journalist's blog on the Pressa portal (Brovko, 2023).

K. Milutina & M. Sadivnycha (2022) attempt to situate the analysis of memes within the domain of psychology, positing that they function as elements of a so-called "coping strategy", i.e. authors' reactions to particular discomforting events. However, it is more appropriate to speak of thematic clusters of memes that construct corresponding narratives. Clearly, memes are not themselves strategies for overcoming war but rather tools of communication and socio-cultural interaction. A similar perspective is offered by T. Kuznietsova (2024); however, the author examines a limited corpus of material, which

precludes the formulation of broad conclusions about the functioning of memes in the media landscape and allows only for a focused exploration of their communicative-psychological potential.

The authors of the publication *Verbal Internet Memes during Russian Full-Scale War against Ukraine* (Zaporozhets & Belousova, 2024) use the term “verbal Internet memes” in the title, while referring to them simply as “verbal memes” in the main text, without providing a clear definition of the concept. In the context of the research presented in this publication, it is also worth drawing attention to the study of I. Mudra (2023), analyses memes as components of journalistic texts. The author focuses on such functions of memes as entertainment, information delivery, and catharsis. However, the absence of a methodological framework in her study complicates the assessment of the validity and scientific significance of its conclusions.

One potential aspect of researching the role of memes in journalistic texts is the analysis of the narratives they construct. This involves instances where journalists use memes – understood in this study as multimodal units (Wójcicka, 2022) – to highlight pressing issues, especially those that have resonated on social media, and to express evaluative judgments about the events or individuals associated with them. Primarily, this process manifests through meme-generated narratives in authors’ writing that fall into two main categories: “appreciation” and “depreciation”. These narratives are grounded in the dichotomous perception of reality as “us” versus “them”, which underlies a range of stereotypes subsequently reproduced in media texts. A number of publications in Polish media – Fakt, WP Wiadomości, Rzeczpospolita – which disclose a story referencing a post on Twitter (now X) featuring a humorous map, may serve as an example: “The weather in the Czech Kaliningrad. Czechs deny” (Mikołajewicz, 2022b); “A joke about Kaliningrad. Russia got angry” (Mikołajewicz, 2022a); “The Czechs are mocking Russia by “annexing” Kaliningrad after a “victory in the referendum””. “We finally have a unique opportunity to get access to the sea” (PAT, 2022); “Morawiecki responded to jokes on the internet. Putin will not be laughing” (Nowosińska, 2022); “Michał Szułdrzyński: Królewiec is Czechia or a cyberwar with Russia” (Szułdrzyński, 2022), etc.

This study aimed to analyse the narratives of “appreciation” and “depreciation” constructed through memes in Ukrainian and Polish media during the periods of the pandemic and the full-scale Russian aggression against Ukraine. The selection of materials for analysis was guided by two main criteria: the thematic focus of the memes and the positioning of the media outlet within the broader information space. It should be noted that the thematic representation of memes in the selected publications is not comprehensive and does not reflect the full thematic spectrum present in the media during the specified period. Instead,

specific publications were chosen that illustrate diverse editorial approaches to the use of memes in journalistic content. Publications from Polish and Ukrainian media outlets, such as Rzeczpospolita (n.d.), Wiadomości (n.d.), Fakt (n.d.), Rubryka (n.d.), Dyvohliad (n.d.), and Bukvy (n.d.), were analysed. Content analysis was employed to select the research units, while elements of thematic and discourse analysis were used for data systematisation, interpretation, and the identification of contextual and intertextual connections. Narrative analysis was applied to examine and summarise the narratives of “appreciation” and “depreciation” constructed through the use of memes.

Stereotyping “we-they” narratives in memes during the pandemic

In publications from the pandemic period, the stereotyping “we-they” primarily reveals the stance of the author regarding anti-COVID measures and vaccination. For example, in the WP Wiadomości article, *Coronavirus. Sweden. Belief in “Collective Immunity” Failed. The Government Implements Restrictions*, the author describes Sweden’s strategy for combating the coronavirus, aiming to convince readers of its impending failure: “Sweden’s strategy for combating the coronavirus has proven disastrous. The government has dared to impose its first significant restrictions”, “The creator of the Swedish strategy admitted that he “did not expect such a poor development of the epidemiological situation in Sweden”” (Baran, 2020).

At the centre of the journalist’s attention is the figure of Chief Epidemiologist Anders Tegnell. To underscore the perceived failure of his COVID-19 containment policies, the author references the meme “Second Stockholm Syndrome”, creating an antithesis between a “hero adored by many” and the “hero joked about”: “Once-beloved Tegnell, admired by many Swedes – some even tattooed his image on themselves – is increasingly becoming an anti-hero. A meme has appeared online describing the phenomenon of his popularity as the “Second Stockholm Syndrome”, a manifestation of sympathy from the victim towards the perpetrator”. (Baran, 2020). The author reinforces this perspective by evoking the “we/us vs. them/others” dichotomy and contrasting Sweden’s experience with that of other countries, particularly Poland: “At the same time, other European countries, – such as France, Spain, Great Britain, and Poland – introduced strict restrictions. Tegnell believed that Swedes would voluntarily follow the government’s recommendations and stay at home. However, this did not occur” (Baran, 2020).

Notably, the publication has received 123 comments, with the most upvoted ones describing the author’s claims as “propaganda” and “unchecked facts” (Fig. 1a). In other words, reader responses suggest an alternative construction of the “we-they” divide, with many commenters expressing support for the lifting of restrictions.

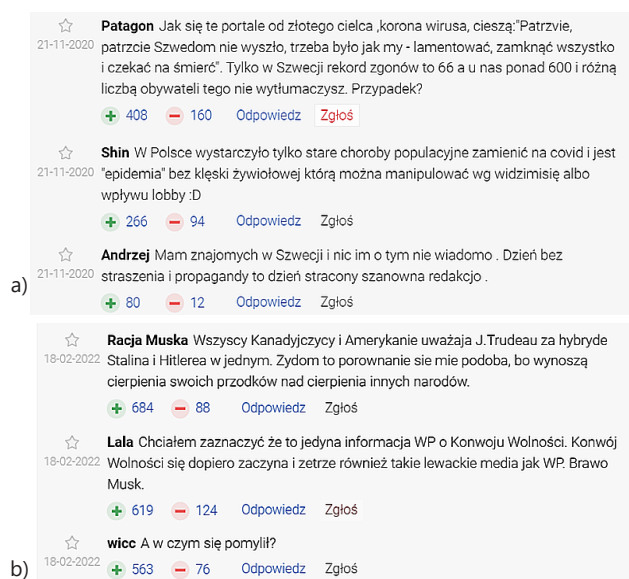


Figure 1. Screenshot of the most popular comments on publications in Wiadomości

Note: a) Belief in “Collective Immunity” Failed. The Government Implements Restrictions; b) The Auschwitz Museum criticised Elon Musk. He quietly deleted the post with Hitler

Source: Wiadomości (n.d.): a – V. Baran (2020); b – B. Kwiatkowska (2022)

In the article, The Auschwitz Museum criticised Elon Musk. He quietly deleted the post with Hitler (Kwiatkowska, 2022), published on Wiadomości, the author analyses the situation that arose after Elon Musk posted a meme on the social network Twitter criticising the Canadian government’s pandemic restrictions. The meme was an image of Adolf Hitler with the caption: “Stop comparing me to Justin Trudeau, I had a budget”. Musk soon deleted the meme without issuing an apology after receiving criticism from the American Jewish Committee and representatives of the Auschwitz Museum. In the article, the meme is treated as a newsworthy event, a visual illustration, and a metatextual element, which enables the author to construct and share their interpretation of the incident with readers. The article includes numerous hypertextual references, which position it within a broader cultural context through intertextual connections, from which two interpretive paradigms can be discerned.

The first paradigm, aligned with the “we” component of the dichotomy, reflects the author’s stance and broadly reinforces it. It includes statements such as that by a representative of the Auschwitz Memorial: “Using the image of Adolf Hitler & therefore exploiting the tragedy of all people who suffered, were humiliated, tortured & murdered by the totalitarian regime of Nazi Germany created by him is sad & disturbing. It disrespects the memory of all victims & hurts many people”, as well as a statement from the American Jewish Committee: “Once again, Elon Musk has exercised extremely poor judgment by invoking Hitler to make a point on

social media. He must stop this unacceptable behaviour”. The author’s narration also contains clearly evaluative language, referring to the meme as “not funny”, and the entire situation as “unpleasant”, and describing Musk as an “anti-vaccinationist”.

The second paradigm, associated with the “they” component of the dichotomy, is represented in:

✓ ...spending, so-called “Mefo bills”: bonds all Germany companies could substitute for tax payments. So he had no budget either...;

✓ a post from Tesla: “Actually, a little-known historical fact is that pre-WWII Germany’s military buildup was in large part financed through deficit spending, so-called “Mefo bills”: bonds all Germany companies could substitute for tax payments. So he had no budget either...”;

✓ a reply to this post of Musk referring to A. Tooze book *The Wages of Destruction: The Making and Breaking of the Nazi Economy* (Tooze, 2008): “For an in-depth explanation, read”

The most upvoted comments under the publication (Fig. 1b) also appear to belong to this paradigm. Its overarching idea is the defence of those who oppose quarantine restrictions, presenting their actions as justified. The analysis of these two articles in Wiadomości reveals a consistent pattern: the “we-they” dichotomy is distributed between the author’s narration and the metatexts linked to newsworthy events (namely, Anders Tegnell’s liberal anti-COVID policies and Elon Musk’s antivaccination stance). The journalists construct their texts from a standpoint supportive of COVID19 restrictions and vaccination, using meme-based metatexts to convey disapproval of opposing views – that is, rejection of pandemic restrictions and vaccines. Notably, the popularity of certain comments suggests that this opposing position is regarded by some readers as the more “correct” one.

In publications by Rzeczpospolita, several types of narrative construction through memes are observed, focusing on both “appreciation” and “depreciation”. In particular, memes are mentioned as elements of disinformation, they often target restrictive measures and vaccination. For example, a news report referencing *The Times* (Russia spreads..., 2020) states that memes became part of an anti-vaccination disinformation campaign. Its main message was that vaccines could turn people into monkeys. In another article, a journalist reflects on the failure of public awareness campaigns intended to educate the population about COVID-19 prevention measures, against the backdrop of declining support for *Zjednoczona Prawica*. The author argues that ministers must take the lead in information campaigns, as “when support decreases, mocking memes and critical posts spread on social media like coronavirus in the autumn” (Dąbrowska, 2020). In this context, memes are portrayed as tools of disinformation, contributing to non-compliance with pandemic restrictions and, consequently, a rise in case numbers.



An interesting example of constructing narratives of “appreciation” and “depreciation” through memes appears in three publications from the Fakt tabloid, focusing on Polish media personality Tomasz Kammel. In the article, Tomasz Kammel is joking about anti-COVID-19 vaccines. Internet users are outraged: how can such content be published?! (BŚ, 2020), it is reported that the presenter posted a meme joke on his social media page (Fig. 2), captioned: “All people who received the smallpox vaccination in 1796 died”. In the lead, the journalist notes that although the meme was a widely circulated joke, many of Kammel’s followers did not find it amusing. The article provides a short biographical note about Kammel, stating that he had taken the pandemic seriously from the outset and had encouraged both the public and those in show business to self-isolate. However, once vaccination began and anti-vaccination slogans started appearing, he posted a poorly received joke. The article concludes with a rhetorical question to readers: “Do you think internet users didn’t understand the joke, or perhaps Tomasz Kammel should not have posted content on such a controversial topic?”.



Figure 2. Screenshot of Tomasz Kammel’s post, which served as a newsworthy event, thematic core, and illustration in the publication

Source: BŚ (2020)

On the same day, another article appeared on the portal: Tomasz Kammel first joked about COVID-19 vaccinations, and now... (PAT, 2020), which again referenced what the authors called an “unsuccessful” meme joke. This time, however, it also reported that Kammel had since been vaccinated and had encouraged others to do the same. A few months later, another piece titled Tomasz Kammel got vaccinated against COVID-19. He dedicated it to his deceased colleague from “A Question for Breakfast” (BŚ, 2021) was published, once again featuring Kammel as the central figure. The story revisits the controversy surrounding his earlier meme but shifts focus to a post on his Instagram account, where he shared a photo taken in a Warsaw hospital at the time

of his vaccination. In the caption, Kammel wrote that he got vaccinated for the sake of his family and in memory of a colleague who had died of COVID-19.

Taken together, this sequence of three articles forms two narratives. The first underscores the responsibility of public figures in shaping public opinion, as illustrated by Kammel’s ill-judged joke. The meme was received ambiguously, with some audience members failing to grasp its satirical undertone. As a result, Kammel had to apologise to his followers, reaffirm his pro-vaccination stance, and publicly confirm that he had been vaccinated. The second narrative promotes the value of preventative measures against COVID-19, particularly the importance of vaccination and the need for public participation in immunisation efforts.

Stereotyping of “we-they” in memes in publications about the war in Ukraine

The following case, concerning farmers, is particularly relevant, due to similar dynamics in the information environments of both Ukraine and Poland. The article Ukrainian memes for a fighting mood: war in Ukraine, farmers, and Konotop witches, published by the Ukrainian media outlet Rubryka, which positions itself as the first “solutions journalism” media platform on the market, appeared in the section “What’s Going On”. The author notes that memes have become “the latest tool of military propaganda”, with their creation and dissemination providing psychological support to citizens (Ukrainian memes..., 2022).

The author, in fact, encourages readers to view memes as a means of maintaining mental health, as humour can help alleviate stress. Accordingly, readers are invited to recall memes featuring ordinary workers who heroically evacuated military equipment from enemy-occupied fields. At the time, two prominent categories of memes were circulating, depicting either Ukrainians or Romani as heroes. The author writes: “Ukrainians are a farming nation. And, as you know, absolutely anything can come in handy in the household – for example, a rocket artillery system or a tank. Ukrainian farmers on tractors have become a legend. We must admit that unlike Romani people stealing a tank, numerous videos with tractors pulling various military equipment are truly legendary”. (Ukrainian memes..., 2022).

The tone of this message is positive and affirming in relation to the “we” element of the dichotomy (“Ukrainians are a farming nation, Ukrainian farmers on tractors have become a legend”). However, the narrative still invokes the second element, “they” not by referencing the aggressor but rather by drawing attention to “another nation”: “unlike Romani people stealing a tank”. On the one hand, the author respectfully uses the ethnonym “Romani”. On the other hand, they distinguish between the Ukrainian farmers’ actions as “legendary” and those of the Romani with a degree of scepticism – highlighting that the story of Ukrainians stealing a tank is a “true

legend". This contrast centres around the use of the words "legend" and "steal".

In Ukrainian, the primary meanings of the word legend are: 1. a folk tale or narrative about particular events or individuals, often embellished with elements of fantasy or folklore; 2. something fictional or false (Explanatory dictionary, n.d.). In both senses, the term denotes a phenomenon shaped by imagination or myth. However, in this context, the author describes Ukrainians as "a nation of farmers that has become a legend", celebrating the heroism of "our" actions. In contrast, the heroism of the "other" is cast into doubt – "unlike the Romani people stealing a tank", evoking longstanding stereotypes: "Romani – thieves" and "Romani – deceivers".

Therefore, in such a short message, the author, while formally maintaining neutrality, clearly demonstrates national stereotypes and constructs narratives of appreciation of "us" and depreciation of "them" through dichotomy. Moreover, in the accompanying meme illustrations, this narrative continues, justifying the perceived "justice" of the message with an image of a tractor pulling a tank, captioned "Some farmer just stole a tank in Ukraine" (Fig. 4). Rather than avoiding stereotypes, the author actively reinforces them. This is further illustrated by an image in the publication focusing on the deeds of farmers. However, it also engages with gender stereotypes. The meme includes three elements (an image of a woman and a man, and a photo of a man), each accompanied by captions: "Never Ask a Woman Her Age; A Man, His Salary; An Ukrainian farmer from where he got his antiaircraft system" (Fig. 3).



Figure 3. Screenshot of meme illustrations in the article
Source: Ukrainian memes... (2022)

Attention should also be drawn to the meme illustration featuring a tractor pulling a tank, particularly in connection with another source (Fig. 4). Another Ukrainian media outlet, Dyvohliad (n.d.), presents the same image – not as a photograph but as a video – with a text reflecting a different tone in the "we-they" dichotomy

(Fig. 4). The headline of the publication reads: In the Kherson region, Ukrainian Gypsies on a tractor stole the occupants' equipment – video. (In the Kherson region ..., 2022).



Figure 4. Screenshot of meme illustrations in the publication

Source: Rubryka (n.d.): a – Ukrainian memes... (2022); Dyvohliad (n.d.): b – In the Kherson region... (2022)

The author uses the term "Gypsies", which is considered inappropriate in media discourse, instead of "Romani". However, there is a peculiar aspect to this word choice: the publication initially refers to the protagonists as "Ukrainian Gypsies", and later simply as "Ukrainians". In the Kherson Region, Ukrainian Gypsies decided to help the Armed Forces of Ukraine by stealing a tank from the occupiers, reports Dyvohliad (In the Kherson region ..., 2022). A bizarre incident occurred in the village of Liubymivka: local Gypsies spotted a Russian tank on the road and decided to "help the occupiers find their way back home". The Ukrainians tied the tank to a tractor and drove off in an unknown direction. One of the Russian soldiers ran after the vehicle but could not catch up. Thus, the author of the publication – which formally resembles a news report – does not explicitly claim to help readers cope with stress or elicit positive emotions. However, they challenge the dichotomy of "wehero" and "they-not a hero", instead emphasising the unity of the entire nation in resisting a common enemy. This framing feels more optimistic than the encouragement offered by the author of the previous publication, whose intended emotional effect may have backfired.

The narrative of "depreciation" (In the Kherson region ..., 2022) targets a different object – namely, Russian military personnel as a common enemy of all individuals who identify as "Ukrainians" living in Ukraine and who have experienced such blatant injustice. The author portrays "ours" as intelligent, witty, and brave,

while “theirs” is depicted as dim-witted and cowardly: “The Ukrainians tied the tank to a tractor and drove off in an unknown direction. One of the Russian soldiers ran after the vehicle but could not catch up with it”, “This is not the first incident confirming that the Ukrainians are a strong and brave nation. They stop enemy tanks with their bare hands, while the Russians surrender their weapons and abandon their equipment”.

It is noteworthy that the author of the publication in Rubryka media (Ukrainian memes..., 2022) follows a similar approach in other meme illustrations related to the farmer theme: “Russian generals that have to tell Putin a Ukrainian farmer stole their tank with a tractor; Ukrainian farmers unlocking the golden tractor after successfully stealing 10,000 Russian tanks” (Fig. 5). The author of the first meme uses a meme template, popular in the Russian-language segment of the internet. The image of actor Ben Affleck smoking thoughtfully with his eyes closed is typically used to depict a person facing a stressful situation. In this media content, the meme with Ben Affleck personifies Russian generals who must report to the Kremlin leader, Putin, that Ukrainian farmers have stolen a tank using a tractor. In this way, the meme creator reinforces the “we-they” stereotype, emphasizing the courage of “us” and the ineptitude of “them”. The second meme conveys the same message through a different method – namely, exaggeration, which serves as a reference to internet gaming culture: for the successful theft of 10,000 Russian tanks, Ukrainian farmers are rewarded with a golden tractor.



Figure 5. Screenshot of meme illustrations in the publication

Source: Rubryka (n.d.): a, b – Ukrainian memes... (2022)

The theme of memes about farmers resurfaced in the media space due to the protests by Polish farmers and the blockade of border checkpoints with Ukraine. In the

Ukrainian media landscape, widespread outrage was provoked by the provocative actions of the protesters, who spilt grain on the ground (Herasymenko, 2024). This topic is particularly sensitive for Ukrainians due to both historical context – the national memory of the Holodomor famine of the 1930s (Holodomor History, n.d.), orchestrated by the Soviet regime – and current realities: mined agricultural land, farmers killed by landmines while working; shelling of Ukrainian agricultural infrastructure by Russian forces (Report on damages..., 2024), among other issues.

The Ukrainian online news outlet Bukvy published a meme on one of its social media accounts (I wonder..., 2024), where the author employed national stereotypes in line with the “we-they” dichotomy. The media outlet shared the meme with the caption: “I wonder if Polish farmers would capture Russian tanks”. This refers to a narrative associated with memes such as “Ukrainians hauling a tank with a tractor” or “Romani stealing a tank”, which portray heroism in resisting the aggressor. Accordingly, the author of the meme published by Bukvy develops an antithesis around this theme, using two widely circulated internet images alongside the well-known meme template “Swole Doge vs. Cheems” (Fig. 6). This template is commonly used to create ironic comparisons between two subjects, with Swole Doge symbolising strength, resilience, and confidence, while Cheems represents weakness, cowardice, and helplessness.



Figure 5. Screenshot of meme illustrations in the Screenshot of a meme on the public page of Bukvy media

Source: I wonder... (2024)

In Figure 6, the upper element features a photo of a tractor with a poster attached, displaying text in Polish: “Putin, zrób porządek z Ukrainą i Brukselą, i z naszymi rządzącymi” (“Putin, arrange order in Ukraine and Brussels, and among our rulers too”), along with an image of Cheems (captioned “Farmers in Poland”), who speaks broken Polish: “Putin, rozberis’, prosymo pana” (“Putin, please deal with it”). The lower element contains a photo of a tractor pulling a Russian tank, accompanied by an

image of Swole Doge (captioned "Farmers in Ukraine"), who speaks in English-Ukrainian surzhyk: "Welkam tu Yukrein, suka!" ("Welcome to Ukraine, b*tch!"). Interestingly, in the caption "'Farmers' in Poland", the word "farmers" appears in quotation marks. On the one hand, this reflects the author's assumption that the protesters are not genuinely who they claim to be. On the other hand, the absence of quotation marks in the second caption, "Farmers in Ukraine", visually reinforces the narrative of authenticity and heroism.

Moreover, the author's choice of language in the textual component of the meme further conveys the underlying message, fitting neatly within the framework of "appreciation" and "depreciation". The use of broken Polish in the appeal to Russia and its leader, and the English-language text written in Latin script incorporating the derogatory Ukrainian term "suka" (bitch), serve to emphasise the contrasting paradigms of "we" and "they": "fighting for good – unity with the global community (English as the language of international communication) – heroism" versus "fighting against good – alignment with the Russian world – treachery and betrayal".

The news context often determines the tone of the narratives found in textual memes or the textual elements of memes used by journalists. For instance, the authors of the article *The Straw Tractor Is Pulling a Tank Made of Straw. This Is a Symbol of Solidarity with Ukrainian Farmers* (Cynalewski & Danielewicz, 2022) on Wyborcza.pl include a description of the meme about Ukrainian farmers in a story about farmers from Jarząbkowo near Gniezno. As a gesture of solidarity with their Ukrainian counterparts, they created an installation of a straw tractor pulling a tank as a symbol of Ukrainian resistance: "This is a direct reference to the war in Ukraine. Several months ago, they went viral worldwide". (Cynalewski & Danielewicz, 2022).

Thus, by examining media publications that employ memes centred on a common theme, one can observe how authors interpret the "we-they" dichotomy through narratives of appreciation and depreciation. Some authors draw on stereotypes related to particular social groups – based on characteristics such as nationality or gender – effectively using memes to normalise these biases (for example, by contrasting Ukrainian farmers on tractors with Romani who steal tanks or referencing women who "should not be asked their age"). This trend highlights the strong influence of social-media communication styles on journalistic content, despite the expectation that journalism should be grounded in facts and adhere to professional standards, particularly the distinction between factual reporting and opinion. Nonetheless, to capture readers' attention, some authors inadvertently

incorporate communicative strategies typical of informal social-media discourse into professional journalism.

Conclusions

Hence, through an analysis of publications in Polish and Ukrainian media such as *Rzeczpospolita*, *Wiadomości*, *Fakt*, *Rubryka*, *Dyvohlad* (5 Channel), and *Bukvy*, the role of verbal memes and the verbal components of memes in shaping narratives that influence public opinion on current issues, including the pandemic and Russia's full-scale invasion of Ukraine, has been examined. Primarily, this concerns narratives of appreciation and depreciation shaped around the "we-they" dichotomy. In publications about COVID-19, Polish journalists typically express approval of anti-COVID restrictions and vaccination; by using meta-textual memes, they construct narratives of "depreciation" regarding positions that oppose the need for such measures. A similar trend is observed in publications discussing memes as elements of anti-vaccination information campaigns. Through use in various functions, authors shape narratives concerning the responsibility of politicians and public figures for societal attitudes towards COVID-19 restrictions and vaccination.

In publications concerning the war, narratives of "appreciation" and "depreciation" – as illustrated by examples involving memes about farmers – are distinctly agitational and encouraging. In this context, the "ours" element of the dichotomy is associated with heroism, bravery, and the courage of those resisting the aggressor, while the "theirs" element conveys an assessment of the aggressor as both cunning and weak.

The analysed examples demonstrate that memes when incorporated into journalistic texts, function as one of the authors' creative tools and do not necessarily compromise adherence to journalistic standards. In other words, strategies for meme usage may either support or undermine these standards, depending primarily on the editorial policy of the media outlet. Further research on this topic, involving a broader range of materials from Polish and Ukrainian media as well as publications from the English-language European context, appears to be promising.

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Наративи поцінування і знецінення, сформовані мемами в авторських публікаціях періоду криз у масмедіа Польщі та України

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Анотація. Меми як складні мультимодальні одиниці та сформовані ними наративи, що впливають на громадську думку щодо актуальних проблем реальності, є актуальною та малодослідженою темою. У статті запропоновані результати аналізу одного із її аспектів – роль мемів у формуванні наративів поцінування й знецінення в публікаціях польських та українських медіа часів пандемії та повномасштабного вторгнення РФ в Україну. Для досягнення цієї мети використано тематичний, контент-, дискурс- та наративний аналіз. Матеріалами були публікації, що з'явилися на сторінках видань *Rzeczpospolita*, *Wiadomości*, *Fakt*, *Rubryka*, *Dyvohlad* (5 channel), *Bukvu* з грудня 2019 до грудня 2023 року. У виборі медіа було враховано такі критерії, як тематика мемів та позиціювання видання в інформаційному просторі. Перший критерій передбачає, що тематичне представлення мемів у публікації не є репрезентативним, тобто не відображає всієї тематичної палітри, представленої в медіа цього періоду. Натомість обрано окремі публікації в медіа, що презентують різні підходи до редакторської політики, зокрема використання мемів у публікаціях. Визначено, що, з одного боку, за допомогою мемів автори прямо чи опосередковано дають оцінку діям політиків, антивакцинаторів, представників церкви, віп-персон, громадськості в умовах пандемічної невизначеності; характеризують різноманітні події суспільного життя; розставляють акценти «свій-чужий», «агресивний-дружелюбний» в інформаційному протистоянні тощо. З іншого боку, меми є оцінною реакцією героїв публікації або інтерв'ююваних, інформаційним приводом або самою подією, що потребує опису й аналізу. Інтерпретація таких оцінних елементів ускладнена тим, що різножанрові журналістські матеріали є багаторівневою системою із численними інтертекстовими зв'язками. Результати дослідження можуть бути використані для науково обґрунтованого аналізу тенденцій у журналістській творчості, зокрема під час викладання такої дисципліни, у роботі журналістів, наприклад, як інструмент залучення й утримання аудиторії

Ключові слова: журналістика; наратив; стереотип; свій – чужий; метатекст; інтертекстуальність



Features of the formation of collections and subject areas of scientific journals in the scientometric databases Scopus and Web of Science

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Abstract. The research relevance is determined by the growing role of Scopus and Web of Science as key tools for evaluation of scientific activities and the need to optimise the processes of forming collections and determining the subject areas of scientific journals to increase visibility and influence in the global scientific space. The study aimed to analyse the peculiarities of forming collections and determining the subject areas of scientific journals indexed in the international scientometric databases Scopus and Web of Science. Research methods included analysis and synthesis, systematisation and generalisation of data, as well as content analysis of scientometric databases Scopus and Web of Science, used to identify the specifics of the formation of collections and subject areas of scientific periodicals. The criteria for the selection of periodicals, the structure of subject areas and the specifics of the formation of collections in Web of Science were addressed. Differences in approaches to the classification of scientific journals by subject areas were analysed, and the impact of these differences on the representativeness of scientific research in various fields of knowledge was investigated. The main trends in the development of collections and subject areas of scientific journals in the context of modern requirements for scientometric indicators and international standards of scientific communication were identified. The study demonstrated that the Scopus and Web of Science databases have different approaches to classifying subject areas. The study determined that Scopus is characterised by a wider coverage of journals, especially in the social and medical sciences, while Web of Science emphasises journals with a high impact factor. The classification of subject areas is also different, which should be accounted for during search and analysis of scientific sources. The practical significance of the study is determined by empirically grounded data on the formation of journal collections and subject areas in Scopus and Web of Science, which will contribute to optimisation of publication strategies, increasing research visibility, and improving the evaluation of scientific contribution, therefore beneficial for researchers and postgraduate students

Keywords: classification; research; publications; impact factor; scientific communication

Introduction

The research relevance is determined by the need for a broader determination of the peculiarities of the formation of collections and subject areas of scientific journals in Scopus and Web of Science for the correct use of these databases in scientific research. In scientific discourse, the

Scopus and Web of Science databases are central in evaluation of scientific activity, ranking scientific journals, and shaping the global information space. However, despite the importance, there are discussions about the completeness and objectivity of scientific information in these databases.

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Research on the analysis of scientometric databases is becoming increasingly relevant. For instance, S. Piltai *et al.* (2023) investigated the peculiarities of publishing scientific articles in Scopus and Web of Science databases, emphasising the role in increasing the visibility and impact of scientific research. The study addressed the key requirements and selection criteria for journals indexed in these databases and provided practical recommendations for compilation of scientific publications.

In the context of the development of digital technologies, in particular artificial intelligence, it is necessary to analyse the publication of relevant research in scientometric databases. C. Tapullima-Mori *et al.* (2024) analysed publications on the application of artificial intelligence in education. The study identified key trends and research areas in this field and analysed the citation and impact of relevant publications in Scopus and Web of Science.

Studies conducted by J. Tennant (2020) noted that that Web of Science and Scopus are not global databases, but reflect only a certain part of scientific publications. This necessitates a critical reflection on the role as the only criterion for evaluating scientific activity and addressing other search engines for scientific publications. A comparative analysis of the coverage of journals in Web of Science and Scopus by P. Mongeon & A. Paul-Hus (2016) revealed differences in the collections, which affects the results of scientific research. The results obtained in the study can be used as an empirical basis for further comparative studies on the dynamics of coverage of scientific periodicals by leading scientometric databases. The identified features of the formation of collections and subject areas will contribute to a deeper determination of the indexing criteria and the impact on the representativeness of scientific information. Furthermore, R. Pranckutė (2021) examined the role of Web of Science and Scopus as primary sources of bibliographic information in the modern academic world, but also emphasises the need for a critical approach. Notably, awareness of the potential limitations and biases inherent in these scientometric databases is an important aspect to ensure the objectivity of the evaluation of scientific publications. Further research can address the impact of the editorial policy of journals and the criteria for inclusion in Scopus and Web of Science on the formation of their collections and subject areas.

Research conducted by V. Singh *et al.* (2021) compared the coverage of journals in Web of Science and Scopus, identifying differences in collections and the impact of these differences on scientific performance. The results of the analysis can be directly applied by researchers in selection a target journal for publication, accounting for the specifics of the formation of collections and subject areas in Web of Science and Scopus, which will increase the probability of indexing and citing in the relevant scientometric database. W. Liu *et al.* (2019) analysed the use of Web of Science and Scopus for academic publications, emphasising the importance for

scientific communication. The analysis confirmed the key role of Web of Science and Scopus as fundamental tools for representing and evaluating academic productivity in the global scientific community. The findings contribute to a broader determination of the mechanisms of functioning of these scientometric databases as important components of modern scientific communication.

The study aimed to identify and analyse the peculiarities of the formation of collections and subject areas of scientific journals in the Scopus and Web of Science scientometric databases, and to assess the impact on scientific communication and the evaluation of scientific activity. To achieve this goal, the following tasks were set: to analyse the principles of forming collections of scientific journals in Scopus and Web of Science; to compare the classification and subject areas of scientific journals in these scientometric databases; to identify the differences and similarities in quantitative indicators characterising the representation of journals in Scopus and Web of Science.

The research novelty is determined by a comprehensive analysis of the peculiarities of the formation of collections and subject areas of scientific journals in Scopus and Web of Science to identify the impact on scientific communication and evaluation of scientific activity.

Materials and Methods

A set of methods aimed at identification of the peculiarities of the formation of collections and subject areas of scientific journals indexed in the Scopus and Web of Science databases was employed. The methodological approach was based on the principles of comparative analysis, which identified differences and similarities in the structure and content of these databases.

The main research methods included systematic analysis, which was used to study the structure of Scopus and the principles of forming collections of scientific journals in the Web of Science database; comparative analysis, which was used to identify differences and similarities in subject areas and classify scientific journals in these databases; bibliometric analysis, which was used to analyse quantitative indicators characterising the representation of journals in the Scopus and Web of Science databases, in particular, the number of journals in each subject area, citation indices, and other scientometric indicators (impact factor and scientific activity). An information search was used to collect and analyse data from the official websites of Scopus (Scopus, n.d.) and Web of Science (Web of Science, n.d.), as well as from scientific publications related to the research topic (Singh *et al.*, 2021; Piltai *et al.*, 2021; Tapullima-Mori *et al.*, 2024).

The application of a set of methods, including systematic, comparative and bibliometric analysis, as well as information search, was used for a comprehensive study of the peculiarities of the formation of collections and subject areas of scientific journals in the Scopus and Web of Science databases. The analysis was based on

information obtained directly from the databases, as well as from official documents and scientific publications related to the research topic (Liu *et al.*, 2019, Tennant, 2020).

Results and Discussion

An analysis of the scientific literature demonstrated a growing interest in the study of scientometric databases as tools for evaluating scientific activity. Researchers are actively studying the impact of these databases on the development of scientific communication, the formation of scientific collections, and the identification of priority areas of research. However, despite the significant number of publications, some aspects of the formation of collections and subject areas of scientific journals in the Scopus and Web of Science databases remain insufficiently studied. In particular, the following need to be studied in more detail: the dynamics of changes in subject headings and the impact on the reflection of scientific trends; the peculiarities of the formation of interdisciplinary fields and the role in the development of interdisciplinary research; the impact of journal selection algorithms on the representation of different scientific fields; a comparative analysis of the criteria for selecting journals for the Scopus and Web of Science databases, addressing the specifics of different scientific fields.

The study addressed the peculiarities of the formation of collections and subject areas of scientific journals in the Scopus and Web of Science scientometric databases. The analysis has revealed key differences and similarities in the approaches to the formation of the classification of subject areas and the criteria for selecting journals that reflect the specifics of each database. The obtained results can be used to assess the impact of these features on scientific communication and evaluation of scientific activity.

The study has demonstrated that the Scopus and Web of Science scientometric databases, despite common goals of providing access to high-quality scientific information, have different approaches to the classification of subject areas. The identified differences relate to both quantitative and qualitative characteristics of the journals presented, which affects visibility in the scientific community. Analysis of these differences is substantial for determination of the principles of scientometric databases and the impact on scientific communication.

Notably, Web of Science is a highly respected global citation database, central in shaping the modern scientific information space. For scientific publications, indexing in the main collection of Web of Science is a strategic priority, as it contributes to a significant increase in their visibility and influence in the international scientific environment. The Web of Science Core Collection (Fig. 1) is represented by six citation indices covering a wide range of scientific disciplines, including the natural sciences, social sciences, arts, and humanities. The total volume of the database exceeds one billion citations, thus providing wide access to relevant information from

more than 250 scientific fields. A unique feature of Web of Science is the indexing of all metadata, which establishes comprehensive links between research and the broader scientific context (Which Clarivate products do you have access to? (n.d.).

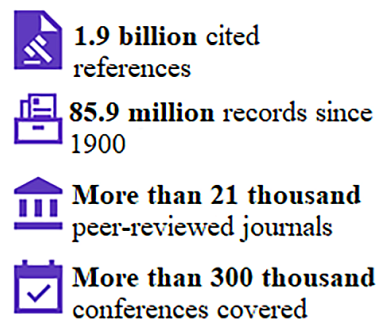


Figure 1. Web of Science Core Collection (data for 2023)
Source: Which Clarivate products do you have access to? (n.d.)

Indexing of scientific journals in Web of Science increases accessibility to the international scientific community and is a prerequisite for obtaining the impact factor, a substantial metric for the scientific reputation of the publication. Of particular importance is the use of the Web of Science Core Collection platform, which is a leading international abstract and bibliographic database of scientific citation that provides access to carefully selected scientific publications. This platform indexes articles from the most influential periodicals, monographs and conference proceedings covering a wide range of scientific disciplines.

One of the key features of Web of Science is its chronological depth, which enables retrospective search of publications dating back to 1900 (Collection List Downloads, n.d.). The depth of chronological coverage depends on the subscription level of the institution providing access to this database. The analysis of the Web of Science platform (Web of Science, n.d.) has revealed its key role as a tool for scientists, researchers and librarians, which is to ensure effective search for relevant scientific publications, possibility to conduct an accurate and comprehensive search for scientific materials that meet the specified criteria; tracking the citation of scientific papers, which can be used to analyse the citation of scientific papers, which is an important indicator of the impact and significance in the scientific community; bibliometric analysis to assess the scientific activities of individual researchers, research teams and institutions.

The analysis of the Web of Science Core Collection demonstrated and identified the structure, which includes the following citation indices: Science Citation Index Expanded (SCIE), Social Sciences Citation Index (SSCI), Arts & Humanities Citation Index (AHCI), and Emerging Sources Citation Index (ESCI) (Fig. 2). The Web of Science core collection includes only journals that meet high editorial standards and demonstrate scientific quality.

Each entry in the Web of Science Core Collection contains a set of metadata that provides complete information about the publication. These include journal title, international standard serial numbers (ISSN and e-ISSN), name and address of the publisher, language of

publication, and subject category to which the journal belongs. This metadata is substantial in the processes of search, analysis, and evaluation of scientific information, efficiently selecting relevant publications and assessing the impact in respective subject areas.



Figure 2. Web of Science Core Collection citation indexes

Source: compiled based on data Collection List Downloads (n.d.)

The study determined that the Science Citation Index Expanded (SCIE) is an expanded version of the Science Citation Index (SCI) and an integral component of the Web of Science Core Collection. This database is an abstract and bibliographic database covering more than 9461 of the most influential scientific periodicals representing 182 scientific disciplines. The total volume of SCIE is more than 67.3 million+ records and more than 1.18 billion cited references, with chronological coverage from 1900 to 2024. Access to the index is provided through the Web of Science online platform, which is part of the Core Collection. The Science Citation Index Expanded (SCIE) is an important tool for scientists, researchers, and information professionals for search and analysis of scientific literature, evaluation of the impact of scientific publications, and trend tracking in the development of scientific disciplines (Science Citation Index Expanded, n.d.).

The Social Sciences Citation Index (SSCI) is a citation index that is part of the Web of Science Core Collection and indexes more than 3547 scientific periodicals covering 47 social science disciplines, as well as selected articles from 3,500 leading scientific and technical journals. The total volume of the database is over 11.6 million+ records and more than 122 million cited references, with chronological coverage from 1900 to 2024. The Social Sciences Citation Index is an important tool for researchers of the social sciences, as it provides access to high-quality scientific publications, which can be used to assess the impact of research (Social Sciences Citation Index, n.d.).

The study determined that the Arts & Humanities Citation Index (AHCI) indexes more than 1818 journals in 25 arts and humanities disciplines. The chronological coverage of the AHCI is from 1975 to 2024, and the total number of records reaches more than 5.5 million+ with 33.4 million cited references (Arts & Humanities Citation Index, n.d.). The study determined that the arts and humanities have specific features, distinguish from the clinical, natural, and social sciences. In particular, the differences relate to the type of scientific content, peer review standards, and citation rules, which should be addressed in analysis and evaluation of scientific publications in

these fields. The findings demonstrate the importance of the AHCI as a tool for evaluating and analysing scientific publications in the arts and humanities, as well as the need to incorporate the specific features of these fields in scientific research.

The study analysed the Emerging Sources Citation Index (ESCI), which is an index of citation of new sources created in 2015. This index includes more than 8496 titles of scientific periodicals, with archival data dating back to 2005. The journals presented in ESCI cover a wide range of scientific disciplines, from international and interdisciplinary publications to journals specialising in narrow regional studies. The total volume of ESCI is more than 5.6 million+ records and 74.4 million cited references, with chronological coverage from 2005 to 2024 (Emerging Sources Citation Index, n.d.). Notably, ESCI included high-quality scientific publications selected based on criteria that reflect the thoroughness of the editorial process and adherence to best practices at the journal level, which emphasises the importance of ESCI as a source of information for researchers seeking to learn relevant scientific works.

The analysis of the Web of Science scientometric database revealed the presence of the Book Citation Index (BKCI), which is an index of book citations. According to the analysis, the BKCI includes more than 157,000 editorially selected monographs and collections, with 10,000 new publications added annually. The total volume of cited references is more than 53.2 million, with chronological coverage from 2005 to 2024 (Book Citation Index, n.d.).

The Book Citation Index is a multidisciplinary resource covering the fields of social sciences, arts and humanities. Furthermore, BKCI is represented by two separate editions: a scientific edition and an edition of social sciences and humanities. BKCI's scientific publication covers such subject areas as physics, chemistry, engineering, computing and technology, clinical medicine, life sciences, as well as agriculture and biology. In particular, the Social Sciences and Humanities edition covers the relevant disciplines. BKCI series include only books published since 2005, which indicates the relative

modernity of publications in the Web of Science database compared to journal publications, which have been indexed since 1900 (Book Citation Index, n.d.).

The analysis demonstrated that the Conference Proceedings Citation Index (CPCI) is a part of the Web of Science Core Collection and is central in reflecting the latest scientific developments. Conference proceedings indexed in the CPCI are a source of up-to-date information that demonstrates current trends and innovative ideas that have not yet been reflected in periodicals. In this case, the CPCI can be used to search cited references to assess the impact of scientific conferences on the development of science. The Conference Proceedings Citation Index contains more than 314,000 conference proceedings with 70 million cited references, with chronological coverage from 1990 to 2024 (Conference Proceedings Citation Index, n.d.). Thus, CPCI is an important tool for scientists, researchers and analysts to track current scientific developments, assess the impact of conferences on the development of scientific fields and search for relevant information.

There are other thematic collections on the Web of Science platform, such as Specialty hosted collections (CABI: CAB Abstracts and Global Health, Food Science and Technology Abstracts, Inspec, Medline); Regional collections (ARCI Arabic Citation Index, Chinese Science Citation Database, KCI Korean Journal Database, SciELO Citation Index); Specialty collections (Zoological Record, Current Contents Connect, Biological Abstracts, BIOSIS Citation Index); Patent, data and preprint collections (Data Citation Index, Derwent Innovations Index and Preprint Citation Index) (Fig. 3).

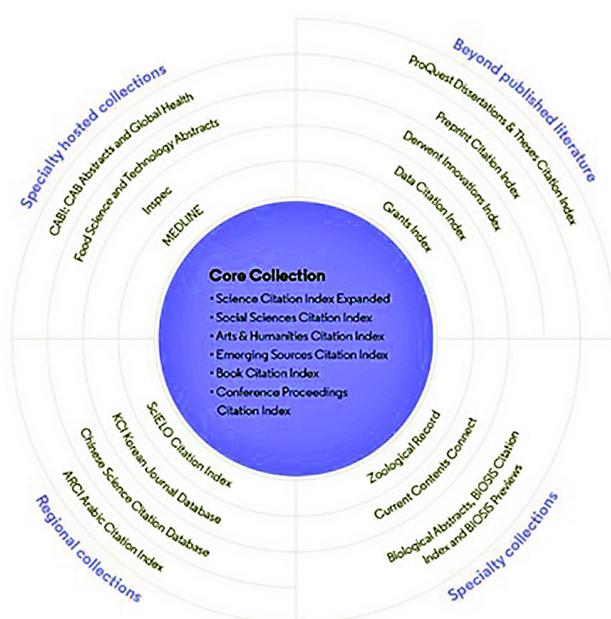


Figure 3. Structure of the Web of Science scientometric database

Source: Which Clarivate products do you have access to? (n.d.)

Importantly, despite the indexing of journals on the Web of Science platform, articles from these journals included in the specified collections are not subject to general indexing. Articles are indexed exclusively for the journals included in the Core Collections – the main collection of Web of Science. The analysis of the Web of Science platform (Web of Science, n.d.) revealed its complex structure, which includes the main collection and specialised collections, each of which has a selection and indexing criteria. The main collection of Web of Science is a key resource of the platform, which covers more than 21,000 peer-reviewed high quality scientific journals from around the world, including open access publications. In addition, the collection contains more than 205,000 conference proceedings and 104,000 books selected by the editorial board.

The revealed multicomponent structure of Web of Science indicates a differentiated approach to the formation of collections, which can be used to the representativeness and quality of the presented scientific publications. Specialised collections that operate in parallel with the main collection reflect the specifics of individual fields of knowledge and types of scientific publications. The results of the study demonstrate that Web of Science is a comprehensive platform that provides access to a wide range of scientific information. The diversity of collections and selection criteria meets the needs of different categories of users, including scientists, researchers, teachers, and students. Notably, the Web of Science Core Collection is substantial for scientometric analysis and evaluation of scientific activity. The careful selection of publications, wide coverage of scientific disciplines, and deep chronology render this database indispensable for scientists, researchers, and librarians.

The analysis revealed that Scopus (n.d.) is an abstract and analytical database developed by the Elsevier publishing corporation in 2004. It aims to optimise the research activities of scientific institutions and professionals in the field of science and healthcare. Scopus is positioned as one of the leading databases of abstracts and citations of peer-reviewed scientific periodicals. Indexing of a scientific journal in Scopus indicates that the scientific papers published in it are incorporated during citation analysis among 70 million other scientific publications included in the Scopus database. The results of the study demonstrated that Scopus is actively used by more than 4,500 universities and 150 research organisations around the world to evaluate the effectiveness of scientific research, which confirms its important role in the modern system of scientific communication and evaluation of scientific activity (Scopus Content, n.d.).

An analysis of the structure of the Scopus scientometric database (Fig. 4) has shown that trust in the information presented in this database is based on the high level of verification and selection of content. Scopus indexes publications from more than 7000 publishers that

are thoroughly verified and selected by an independent Content Selection Advisory Board (CSAB). Therefore, this process ensures the high quality of scientific publications presented in Scopus, which, in turn, contributes

to the reliability and credibility of information obtained by researchers using this database. Thus, indexing a publication in Scopus is an indicator of its credibility and scientific value.

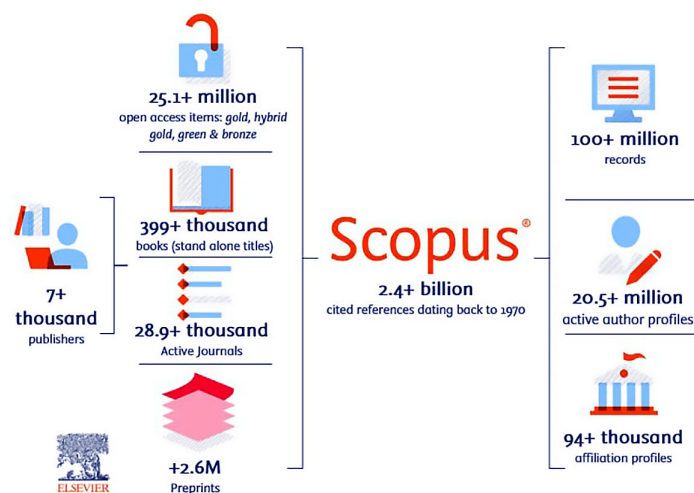


Figure 4. Scopus scientometric database

The numbers shown are rounded and are current as of February 2025.

Source: Scopus (n.d.)

The list of foreign journals indexed in the Scopus scientometric database includes medical, legal, economic, pedagogical, behavioral, theoretical, and empirical aspects. In the context of the analysis of the peculiarities of the formation of collections and subject areas of scientific journals in the Scopus (n.d.) and Web of Science (n.d.) databases, an important step is a comparative study of key characteristics. To visualise the data obtained and identify differences and similarities between these platforms, a comparative table was developed. It contains information on the size of databases, subject areas, journal selection criteria, citation analysis tools, and other important parameters.

The presented table (Table 1.) is the result of a comprehensive analysis of the Scopus (n.d.) and Web of Science (n.d.) scientometric databases, as well as scientific publications related to the subject of the study. In particular, the table systematised and visualised the data obtained, providing a comparative analysis of the key characteristics of scientometric databases. This, in turn, contributes to the formation of objective conclusions about the peculiarities of the formation of collections and subject areas of the Scopus and Web of Science scientometric databases, as well as their impact on scientific communication and evaluation of scientific activities.

Table 1. Comparative analysis of Scopus and Web of Science

	Web of Science	Scopus
Creation	1900	2004
Number of indexed materials (as of the end of 2024)	More than 235 million records (journals, books and materials)	More than 100 million records
Number of journals (as of the end of 2024)	> 34,865 journals + books, materials, patents and datasets	> 28,900 journals + 399,000 books
Update frequency	Each collection is updated on its own schedule from daily to monthly. Main collection daily (7 days a week)	Updated daily
Number of citations (as of the end of 2024)	2.95 billion	2.4 billion
Subject areas covered	Life sciences, clinical medicine, animal and plant biology, biotechnology, agriculture, environmental sciences, physics, chemistry, earth sciences, mathematics, engineering, technology, computer science	Life and health sciences; chemistry, physics, mathematics, engineering, social sciences, psychology, economics, biology, agriculture, ecology, general sciences
Geographical coverage	80 countries	60% of titles originate from countries other than the US

Source: compiled based on Scopus Content (n.d.), Web of Science (n.d.)

A comparative analysis of the Scopus and Web of Science scientometric databases revealed both common and distinctive features in the structure and functionality. As the analysis demonstrated, Scopus and Web of Science are highly valued scientometric databases of scientific information used to evaluate scientific activities, search for relevant publications and analyse citations. However, Scopus is characterised by a wider coverage of journals, especially in the social sciences and humanities, while Web of Science has stricter criteria for selecting publications, which ensures high quality of the information provided.

The results of the study demonstrated that Scopus and Web of Science are complementary tools for scientists, researchers, and analysts. The choice of a database depends on the specific needs of the user, in particular, the field of research, the required level of information detail, and the purposes of the analysis. Both databases are substantial in the development of scientific communication and evaluation of scientific activities at the international level.

The analysis of the peculiarities of the formation of collections and subject areas of scientific journals in the Scopus and Web of Science databases revealed both similarities and significant differences in the approaches of these leading tools for evaluating scientific activity. The results are consistent with the general trend noted by F. Ghanadinezhad *et al.* (2023) in a review of approaches to forecasting trends in scientific productivity. The study noted the growing importance of scientometric data for estimation of the dynamics of science, which correlates with the emphasis on analysis of the structure of key scientometric databases.

Comparing the coverage of journals, the analysis confirms the findings of A. Chadegani *et al.* (2013), which indicated the presence of unique publications in the Web of Science and Scopus collections. However, in contrast to the study by A. Selemani *et al.* (2023) on the analysis of African medical journals and identification of specific features of representation in international and regional databases, the present study covers a wider range of scientific disciplines, identifying general trends and specific features of collection formation regardless of geographic or sectoral context.

The analysis of the structure of Web of Science revealed the presence of the main collection and specialised citation indices (SCIE, SSCI, AHCI, ESCI, BKCI, CPCI), which is consistent with the description presented in T. Sych *et al.* (2020), who studied the representation of Ukrainian educational management publications in Scopus and Web of Science. However, T. Sych *et al.* addressed quantitative indicators of representation, while the present study provides a more comprehensive overview of all major Web of Science indices, including chronological coverage and volume, which expands the determination of the capabilities of this platform.

The importance of Web of Science as a highly valued global citation database, as emphasised in the study, correlates with the opinion expressed in the study by J. Mingers & L. Leydesdorff (2015) on the review of the theory and practice of scientometrics on the key role of such tools in shaping the scientific landscape and assessing scientific productivity. At the same time, the detailed study of the structure of the main Web of Science collection and its individual indices (SCIE, SSCI, AHCI, ESCI) broadened the determination of the mechanisms of journal selection and categorisation, which is an important aspect that was partially analysed by L. Bornmann *et al.* (2014) in the study of the scientific productivity of the BRICS countries based on the most cited papers.

The analysis of Scopus, as in J. Moral-Muñoz *et al.* (2020), confirms its positioning as a leading reference and analytical database, as well as the importance of software tools for bibliometric analysis. However, this study emphasises the content selection process by the CSAB as a key mechanism for ensuring the quality and reliability of information, which is an important addition to the general description of the platform and distinguishes this analysis from the review of tools presented by J. Moral-Muñoz *et al.* (2020).

The results of this study also correlated with the findings of a study by O. Vysochan *et al.* (2021) on bibliometric analysis of the literature on sustainable development accounting, emphasising the importance of an appropriate scientometric database to ensure a representative sample. The differences in the formation of collections and subject areas of Scopus and Web of Science confirm the need to address these features during scientometric research in various fields of knowledge.

This study confirmed the general trend of growing interest in scientometric databases as key tools for evaluating scientific activity, which was also noted by C. Herzog *et al.* (2020) and M. Visser *et al.* (2021) emphasising the importance of openness and accessibility of scientometric data for a wider range of researchers, which corresponds to the objective of the principles underlying the formation of these databases. At the same time, the study conducted a comparative analysis of the formation of collections and subject areas in Scopus and Web of Science, which is an important aspect that is partially analysed in the article by M. MacRoberts & B. MacRoberts (2018). In the critical assessment of citation analysis as the main indicator of scientific impact, M. MacRoberts & B. MacRoberts emphasised the need to address the characteristics of different databases and their coverage. The study specified these features by identifying quantitative and qualitative differences in the representation of journals.

In contrast to the article by J. Ravenscroft *et al.* (2017) on extending the metrics of scientific impact beyond the academic environment, the presented study addressed the internal mechanisms of scientometric databases. However, determination of how collections are formed and what subject areas are represented is an

important basis for further analysis of scientific impact. R. Williams & L. Bornmann (2016) and the present study highlighted the importance of data sampling in bibliometric research. R. Williams & L. Bornmann emphasised the potential biases associated with incomplete or unrepresentative coverage of publications. Presented study, revealing differences in the scope and subject coverage of Scopus and Web of Science, emphasised the need for a cautious approach to choosing a database for analysing and interpreting the results.

Thus, the results of the study confirmed the importance of Scopus and Web of Science as key for navigating the global scientific space and evaluating scientific activities. The identified differences in the approaches to the formation of collections and classification of subject areas emphasise the need for a critical reflection on the capabilities and limitations of each of these platforms in conducting research and evaluating their results.

Conclusions

The study identified and analysed the peculiarities of the formation of collections and subject areas of scientific journals in the Scopus and Web of Science scientometric databases. The study established that both databases are important tools for evaluating scientific activity, but they have significant differences in approaches to the formation of subject areas of scientific journals, indexing and selection of articles.

Notably, Web of Science employs a unified set of criteria that ensures a high level of quality of scientific publications presented in the database. This position determined the approach aimed at selecting the most influential and cited journals, which reflects the desire to ensure the highest level of representation of scientific information. Based on this, the classification of scientific periodicals in the Scopus and Web of Science databases shows significant differences, which, in turn, leads to different representation of subject areas. These differences are not only a technical aspect, but also have a direct impact on the processes of analysing and interpreting scientific information. In contrast, Scopus employs a more flexible approach to the selection of scientific journals, covering a wider range of journals in its database. This approach ensures a greater diversity of scientific information presented, which can be useful for researchers working in different fields of science.

The main differences between Scopus and Web of Science are the selection criteria, orientation, and diversity of the information presented. Web of Science uses a standardised set of criteria that ensures a high level of quality of the presented publications, while Scopus uses a more flexible approach that covers a wider range of journals. In particular, Web of Science emphasises selection of the most influential and cited journals, while Scopus includes a wider variety of scientific information. Thus, in particular, Scopus is characterised by a greater variety of scientific information presented, while Web of

Science is distinguished by a high level of quality of the presented publications.

A broad determination of the differences in the classification and presentation of subject areas in Scopus and Web of Science is a prerequisite for the correct analysis of scientific information and the effective use of these databases in research. The choice between Web of Science and Scopus depends on the research goals and user needs. Web of Science is most suitable of access to most influential and high-quality publications is required. However, Scopus is more suitable if broader range of scientific information is necessary.

The analysis of the Web of Science and Scopus scientometric databases revealed both common features and significant differences in characteristics, which is key to the role in modern scientific communication and research evaluation. In particular, the study determined that Web of Science has a deeper chronological coverage, dating back to 1900, while Scopus began its operations in 2004. At the end of 2024, Web of Science indexed more than 235 million records, including journals, books, and conference proceedings, which exceeds more than 100 million records in Scopus. The number of journals represented in Web of Science is also higher, with more than 34,865 titles, compared to more than 28,900 journals in Scopus. Both databases demonstrate a significant number of citations – 2.95 billion in Web of Science and 2.4 billion in Scopus as of the end of 2024, which emphasises the importance as tools for tracking the impact of scientific publications.

In terms of subject areas, Web of Science has broader coverage in such fields as life sciences, clinical medicine, plant and animal biology, biotechnology, agriculture, environmental sciences, physics, chemistry, earth sciences, mathematics, engineering, technology, and computer science. Scopus, on the other hand, covers life and health sciences, chemistry, physics, mathematics, engineering, social sciences, psychology, economics, biology, agriculture, ecology, and general sciences.

These statistics emphasised that, despite the common goal, Web of Science and Scopus have quantitative and qualitative differences in collections and subject areas. These differences should be incorporated by researchers in selection of a platform for information retrieval, evaluating research activities, and determining a strategy for publishing. A deeper determination of these features will contribute to a more efficient use of the capabilities of each of the scientometric databases. Further research should analyse changes in the composition of collections and subject headings in both databases, their impact on researchers' publication strategies, and a comparative study of journal inclusion/exclusion criteria, considering the evolution of scientific fields and interdisciplinary research.

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Особливості формування колекцій та предметних галузей наукових журналів у наукометричних базах даних Scopus та Web of Science

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Анотація. Актуальність досліджуваної проблеми зумовлена зростаючою роллю наукометричних баз даних Scopus та Web of Science як ключових інструментів оцінювання наукової діяльності та необхідністю оптимізації процесів формування колекцій і визначення предметних галузей наукових журналів для підвищення їхньої видимості та впливовості у глобальному науковому просторі. Метою статті було дослідити особливості формування колекцій та визначити предметні галузі наукових журналів, що індексуються у міжнародних наукометричних базах даних Scopus та Web of Science. Методи дослідження: для виявлення специфіки формування колекцій та предметних галузей наукових періодичних видань використано методи аналізу та синтезу, систематизації та узагальнення даних, а також контент-аналізу наукометричних баз даних Scopus та Web of Science. Розглянуто критерії відбору періодичних видань, структуру предметних галузей та специфіку формування колекцій у Web of Science. Проаналізовано відмінності у підходах до класифікації наукових журналів за предметними галузями та досліджено вплив цих відмінностей на репрезентативність наукових досліджень у різних галузях знань. Визначено основні тенденції розвитку колекцій та предметних галузей наукових журналів у контексті сучасних вимог до наукометричних показників та міжнародних стандартів наукової комунікації. Дослідження показало, що бази даних Scopus та Web of Science мають різні підходи до формування класифікації предметних галузей. Виявлено, що Scopus характеризується ширшим охопленням журналів, особливо в галузі соціальних та медичних наук, тоді як Web of Science фокусується на журналах з високим імпакт-фактором. Класифікація предметних галузей також відрізняється, що слід враховувати при пошуку та аналізі наукової інформації. Практичне значення дослідження полягає в наданні науковцям і аспірантам емпірично обґрунтованих даних про формування колекцій і предметних галузей журналів у Scopus та Web of Science, що сприятиме оптимізації публікаційних стратегій, підвищенню видимості досліджень і покращенню оцінювання наукового внеску

Ключові слова: класифікація; дослідження; публікації; імпакт-фактор; наукова комунікація

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