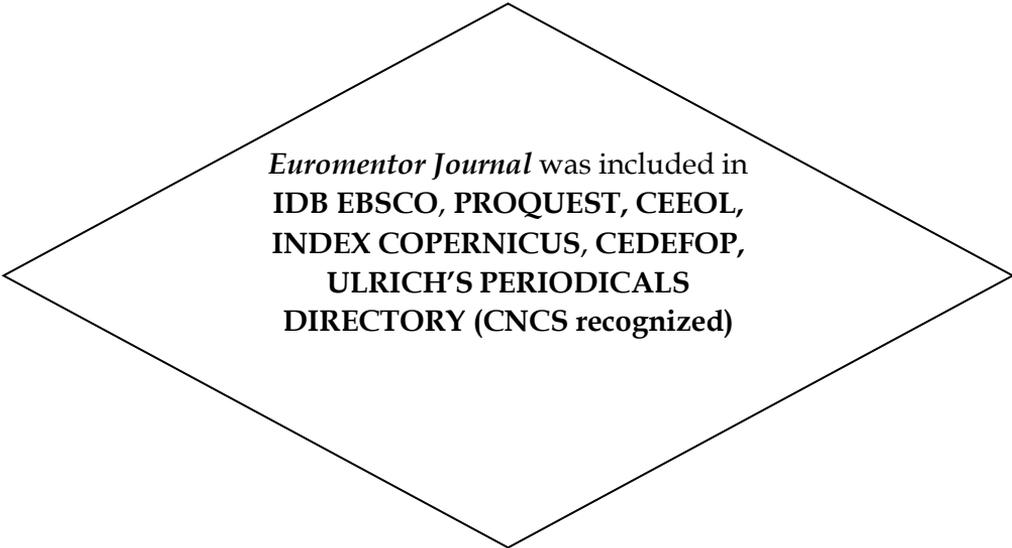


**EUROMENTOR JOURNAL
STUDIES ABOUT EDUCATION**

Volume XI, No. 4/December 2020

“Euromentor Journal” is published by “Dimitrie Cantemir”
Christian University.

Address: Splaiul Unirii no. 176, Bucharest
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Euromentor Journal was included in
**IDB EBSCO, PROQUEST, CEEOL,
INDEX COPERNICUS, CEDEFOP,
ULRICH'S PERIODICALS
DIRECTORY (CNCS recognized)**

EUROMENTOR JOURNAL STUDIES ABOUT EDUCATION

Volume XI, No 4/December 2020



ISSN 2068-780X

Every author is responsible for the originality of the article and that the text was not published previously.

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INTERCULTURAL DIALOGUE AND THE NON-FORMAL TRAINING FOR ADULTS

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Abstract: *"Intercultural experiences are a source of personal enrichment and development. They can take various forms, starting with study opportunities to leisure time spent abroad. Irrespective of their type, these experiences make people ask questions about the human behaviour and attitudes in different contexts.*

Our article represents a direct observation of an international seminar held in Spain which applies the intercultural approach to the development of communication competences. The purpose of the research is to show that all the didactic methods and activities used by the trainers in a non-formal educational context reveal the constant preoccupation to develop intercultural communication skills with the participants and to promote a genuine dialogue between cultures.

Non-formal training methods prove to be effective for adult learning since adults exhibit specific learning methods, characterized by reasoning and volition. "

Keywords: *intercultural, non-formal, adult learning, communication*

"No culture can live if it attempts to be exclusive"
Mahatma Gandhi

Introduction

The globalization of economic, social and political life becomes more and more evident. Throughout the world we can notice a rise in people's mobility, including an increase in the number of migrants of different cultures, religious beliefs and ethnic origins who work, study or live in Europe. Along with adopting the Communicate of making the European space of life-long learning a reality, in November 2001, the European Commission proposed an aspirational program in which life-long training should become crucial for any European citizen, so that the whole Europe should become more tolerant and more democratic.

Migration of people across lands, whether driven by wars, natural disasters, economic compulsion or simply by the urge to move to another civilization, contributed to an intermingling of cultures and civilizations.

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This diversity of cultures, civilizations and beliefs enriched human existence as we embraced each other, learned new things, shared between us and benefited from others' experience.

In fact, as Todorov¹ says, there is no culture totally separated from others. A culture cannot evolve unless it comes into contact with others. That is why cultures are dynamic and evolve in time. The plurality of cultures is a normal condition of spiritual becoming.

As there is no standard definition of culture and the various definitions provided by researchers contain descriptive elements referring to knowledge, experience, values, attitudes, concepts, patterns of behaviour, hierarchies, religion, material objects or possessions etc acquired by a group of people in the long run, in the course of generations through individual or group efforts, we can offer a general definition includes all the aforementioned elements.

Therefore, culture represents a legacy that can be transmitted by specific means of communication such as written/visual (journal, books, manuscripts, newspapers, magazines, arts), oral communication (face to face or by interactive media such as the telephone, webcams, etc) or non-verbal communication (gestures).

One of the basic components of successful mobilities of people throughout the world is their intercultural communication competence. Anca Nedelcu² correlates the context of occurrence of intercultural learning situations with the enlargement of the European Union, the migration phenomenon, and the globalization of mass-media. Also, Fennes and Hapgood³ identify five major socio-economic and political contexts in which intercultural learning happens:

- when groups of migrants live along with the majority population
- through the expansion of global networks and EU enlargement which leads to an increase of interaction between various cultures
- through mass tourism

¹ Tzvetan Todorov, *The Coexistence of Cultures*. In Oxford Literary Review, Edinburgh, Edinburgh University Press, Vol. 19, no. 1/2., 1997, pp. 3-17.

²Anca Nedelcu,, *Învățarea interculturală în școală. Ghid pentru cadrele didactice*. București, Humanitas Educațional, 2004.

³ Fennes Helmut and Karen Hapgood, *Intercultural Learning in the classroom. Crossing Borders*. London, Reywood Books, 1997, p. 40.

- through the connections/partnerships/agreements etc. between highly industrialized countries and the developing ones

Intercultural dialogue in a diverse society

There are plenty of theories on intercultural communication, fact which demonstrates the importance of the research in this field, the broadness of the issue and its adaptability to different domains such as psychology, anthropology, sociology, organizational culture, marketing, tourism, education, etc. But there is no accepted definition for Intercultural Dialogue. The term is an adaptation from other terms, all of which remain current, such as multiculturalism, social cohesion and assimilation. The best formulation at the moment is perhaps the terminology used by the Council of Europe in its White Paper on Intercultural Dialogue⁴, which states:

“Intercultural Dialogue is understood as an open and respectful exchange of views between individuals and groups with different ethnic, cultural, religious and linguistic backgrounds and heritage”.

There are authors who believe that effective intercultural communication depends on the inherited cultural patterns of the interlocutors. These patterns constitute reference grids by means of which speakers decode and interpret the messages. Therefore, intercultural dialogue is highly contextual and the more knowledge about the interlocutor’s culture the speaker has the more effective the dialogue becomes.

In the area of educational research, the teaching of intercultural communication skills is said to have an important impact on effective communication. According to Hoopes⁵ intercultural communication encompasses the study of non-verbal as well as verbal behaviors, theoretical cultural constructs, and perceptual frames of reference. Although there is naturally a broad overlap, the distinction between interpersonal communication and intercultural communication is that the

⁴ White Paper on Intercultural Dialogue, accessible on the web address http://www.coe.int/t/dg4/intercultural/Source/Pub_White_Paper/White%20Paper_final_revised_EN.pdf,2008.

⁵ David Hoopes, *Intercultural communication concepts and the psychology of intercultural experience*. In Margaret Pusch (ed.) *Multicultural Education. A Cross-cultural Training Approach*. Yarmouth, Intercultural Press, 1979.

latter treats culture as having a major influence on the communication process.

In his attempt to describe cultures Brooks Peterson⁶ opted for a scale of nuances rather than an extremes approach, since it is obvious that overgeneralizations may lead to the appearance of prototypes and stereotypes, which cannot be applied to a whole nation. Thus, on scale from 1 to 10 he describes cultures in terms of equality/hierarchy, direct/indirect, individual/group centered, task/relationship, risk/caution, etc. terms which have been widely used by other researchers as well. For instance, India or Japan are perceived by researchers as hierarchical countries with respect for authority, expecting people in charge to give directions. On the other hand, Americans take initiative and don't expect to be given all details in order to start dealing with a task.

There are many other cultural scales which describe cultures, such as: quality/aesthetic oriented, formal/informal, near/far (regarding the physical space between interlocutors), the degree of comfort with silence, interrupting/taking turns/halting to reflect (regarding the flow of conversation), etc. All of these have equal importance, for instance, it is known that Arab cultures and south Americans are very emotional in conversations and their need of intimacy in communication is reflected in the short physical distance they tend to keep when talking to interlocutors. Even touching the interlocutor is nothing misplaced for them. Though, this doesn't make them inferior to others. On the other hand, the British, Germans, Americans need more personal physical space.

An intercultural experience -non-formal training for adults

Contemporary pedagogy aims at meeting the challenges of the society, by a teaching approach which is open both to innovation and originality. In our present-day context, education and training are not only social needs, but tend to particularize the individuals, to become criteria for establishing the degree of personal development. This remark is supported by the diversity of formal, non-formal and informal ways available for the public with a view to obtain new knowledge, to develop new skills and abilities, to certify some competences. In this respect, the international seminar *Climate Change and Human Rights*, organized by the Association for the Intercultural Training of Young People (AFAIJ -

⁶ Peterson, Brooks, *Cultural Intelligence: A guide to working with people from other cultures*. Maine, USA, Intercultural Press, 2004.

Spain), within the Grundtvig program, aimed at the general objective: raising people's awareness on climate change and human rights, as separate and connected issues for everyone in the world through an intercultural approach.

The Grundtvig program aims at strengthening the European dimension of education and to the application of the principle of life-long learning, thus contributing to the facilitation of access to education for all those who wish, irrespective of their age, to develop and acquire new knowledge, skills and competences. The participants in this seminar, with ages between 20 and over 45 years old came here with personal experiences, from different socio-cultural and professional environments. In this context, the organization and unfolding of the seminar had as objectives developing skills in the following areas: communication and socializing in English, delivering presentations, cultural tolerance and group adaptability.

In this respect, the training strategies used in the unfolding of the activities proposed by the organizers were active-participatory, and the learning aimed at the integration of knowledge, creation and originality.

In the following lines, we shall describe the main training methods used in the seminar:

- starting with the PPT *presentation* of the materials drawn up by every participant (or team), the main training method was the *presentation-debate*. In this way, the participants were actively involved in analyzing and debating on the proposed topic (climate changes and human rights). The method offered the possibility of approaching the same topic in a different manner, giving way to drawing some common conclusions, but also highlighting some diverse points of view, fact which lead to an argumented dialogue.
- another method used in this seminar was the *presentation with an opponent*; a member of the group of participants, well-informed and having a critical mind intervened during the presentation by asking questions, making remarks, asking for clarification, etc. The opponent has the role of enlivening the atmosphere with an intention to underline conceptual difficulties and, during this time, the audience being directed towards concentrating on the argumentation.
- by the *case study* technique used in the seminar, which facilitated direct encounters with real life situations, the

participants were encouraged to express freely, to argue and observe critically the dialogue. As informative support for this technique was the film “An inconvenient truth”, which was a basis for debating on the theory of global warming effects, with an intercultural approach, using comparison between different countries.

- *the exercise* as a training method was used in various forms: the observation exercise, the matching exercise, the warm-up exercise, the follow-up exercise, etc. A special place was held by the *team-building* exercise and amongst its objectives we can mention: participants’ socializing and mutual appreciation, valuing the individual potential in the group, orientation towards results and solutions, establishing socio-professional and socio-cultural connections between the members.
- *the project work* (“*learning by doing*”) represented another form of the classical exercise. The participants were asked to work in teams on different applicable tasks with a view to strengthen and summarize knowledge based on some problem-solving elements, on research and group creativity. As an example, the participants were asked to use a collage of photos which presented behaviors regarding the infringement/the observance of human rights and to elaborate in the team a title and the message of the mass-media article which the photos depicted. Another exercise of this type was to draw up a European project based on a given topic, which was previously brainstormed on.
- *visits* to thematic places *and discussions with the specialists* in the field of activity related to the topic of the seminar were other methods of training in this seminar agenda, the participants being able to learn in direct relationship with of the teaching object.

The personal observations based on the activities unfolded in the seminar highlighted some base rules in adults’ education, theorized in the specialty literature by various authors (Rogers⁷, Knowles⁸):

⁷ Rogers Carl Ransom, *Freedom to Learn*, Columbus, OH, Merrill, 1969.

⁸ Malcolm Knowles, *The Adult Learner: A Neglected Species*, Houston, Gulf Publishing, 1984.

- adults want to know why they have to learn something; the adult learner has to consider it important to acquire new competences, knowledge and skills;
- adults have more numerous and various experiences than young people, so that the corroboration of the new process of learning with the experience may increase the significance of the new learning situations and may help the participant acquire and integrate new knowledge;
- adults are ready to learn again when they are confronted with a life situation for which they need more knowledge and skills;
- adults engage in the learning process, aiming at solving some tasks within the framework of the learning situation.

In the case of adults' training one should take into account the fact that learning has to be perceived more as a process than in terms of results, a process of creative knowledge, a continuous process based on experience and which involves direct exchanges between individual and the environment.

Based on these remarks and the direct observations, at the level of the group of participants the following learning behaviour types were noticed:

- the active type – the person open to obtain new information and knowledge, who learns constantly and enthusiastically;
- the pragmatic type – who likes to try new ideas and to transform theory into practice;
- the theorist – the person who likes rational thinking and synthesizes information in logical patterns in order to acquire it;
- the reflexive type – the one who takes a step back, observes and thinks more before actively being involved.

According to Kolb's learning styles⁹ the key words which differentiate between people's learning methods might be: experimentation, reflection, theoretical, performance. These traits characterize the way people learn and how they behave when they are confronted with new information which should be learned. The four learning behaviour types identified by us in the intercultural seminar resemble Kolb's learning styles and are proof that adults learn differently than children. The reason why adults

⁹ David Allen, Kolb, *Experiential learning: Experience as the source of learning and development*, Englewood Cliffs, NJ, Prentice-Hall, 1984.

learn differently is because they rely on both experience and their reasoning when they decide what they should learn and if they validate the new information.

All these arguments go for assimilating this seminar to a real intercultural dialogue, taking into account the fact that such a learning experience is characterized by dynamism and recognition of differences in a given situation. Awareness raising on the issue of global warming and human rights in an intercultural context involves not only an informational aspect but especially an attitudinal-behavioral one.

The development of intercultural communication competence through non-formal activities

Many programmes and initiatives seem to advertise intercultural learning with the belief that through increasing the contact between culturally diverse people and raising awareness on cultural difference, tolerance and acceptance can be promoted. But just being aware of cultural differences is not good enough.

Intercultural competence is less about becoming familiar with stereotypes and more about openness, flexibility, empathy, ethno-relativism, trusting others, emotional control, non-judgmental behaviour and the list may continue. It is important that intercultural competence training and skills should not break down into the application of stereotypes of a group of individuals.

The goal of intercultural learning may be formulated as acquisition of intercultural competence, defined both by the American and European researchers in terms of its structure as a set of knowledge, attitudes and skills, thus, defined at cognitive, affective and behavioral level (Althen¹⁰, Fennes and Hapgood¹¹).

On the other hand, in terms of teaching methods and approaches, intercultural learning was defined as experiential learning, learner-centered learning, content-based learning, observation-based learning, social learning, and learning to adapt and understand cultural values. In this respect, the objectives of the training seminar we participated in meets the goals of intercultural learning.

¹⁰ Gary Althen, (ed.), *Learning Across Cultures*. USA, NAFSA (Association of International Educators), 1994.

¹¹ Fennes Helmut și Karen Hapgood, *Intercultural Learning in the classroom. Crossing Borders*. London, Reywood Books, 1997.

All the activities which were mentioned above under the chapter „An intercultural experience – non-formal training for adults” aimed at developing the intercultural communication competence by informal and non-formal education.

The most representative intercultural activities unfolded in the seminar were:

- warm-up activities used at the beginning of the seminar in order to introduce the participants, to raise interest in getting to know each other and to emphasize the cultural diversity of the participants. In this respect, we can present two games which raised the interest: the circle introduction and the moving circle for intercultural communication. The first ludic element represented a tour of the table – type of game, in which the participants have to tell their names and to mention one element which defines them. The other game – the moving circle – consists of the creation of one exterior circle and an interior one. The exterior circle moves one step laterally so that the pair of participants who could interact should be different. The trainer asks one question for the participants to discuss it with the partner in front of them. As the exterior circle moves one step to the left side and the inner one stays still, the participants have the chance to talk to various other people about different questions. The questions referred both to cultural aspects of each country and to personal issues.

- group activities to develop team-working skills such as the project work. A group of 4-5 participants are requested to work together on a project on a given topic related to the seminar’s theme (climate change, ecology, human rights, cultural issues). The group members have to define the structure of the project and to provide information about their topic.

- activities to promote cultural diversity such as cultural nights, culturally diverse specific meals, visits to cultural sites with guide, individual presentations.

Conclusions

All the activities proposed by the trainers in this international seminar are proof of the possibility to assimilate this seminar to a real intercultural dialogue. Any social topic which is discussed in an international seminar turns it into a real intercultural dialogue. Moreover, the informal and non-formal learning experience, characterized by dynamism and recognition of differences, creates the space for the promotion of intercultural communication. Raising peoples’ awareness on climate change and

human rights in an intercultural context doesn't only involve knowledge acquisition but more than that, it changes attitudes and behaviors.

Compared with the beginning of the last century, humanity today is witnessing much more dynamic intercultural interactions at both between-society contact and within-society contact levels. As a result, the modern man, more than ever before, has chance to encounter, on daily basis, cultures, worldviews and values that significantly or even shockingly differ from his own. As rightly observed by social scientists and theologians, diversity is one of the most basic principles of human earthly life and interaction, without which human life would be meaningless and boring.

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COSMOSOPHY OF PHILOSOPHY VERSUS COSMOLOGY OF THEOLOGY.

LUCIAN BLAGA VERSUS DUMITRU STĂNILOAE

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Abstract: *Contradictions have often arisen between philosophy and theology based on the way thinking relates to God. The two systems of thought present the creation of the world in general and of man in particular, one having the world of ideas as foundation, and the other the divine Revelation. The meeting of philosophical and theological thinking has always drawn the attention, as they both are dealing with the same topic, based on different foundations, so a question might be asked: where is the truth? Could it be known to man? Could man participate in happiness through the truth? Could the relativity of earthly truth and happiness be overcome? Is there a possibility of eternal happiness man can participate in? The answer to all these questions can be understood through the comparative study of the cosmosophy of philosophy together with the cosmology of theology.*

Keywords: *Lucian Blaga, Dumitru Staniloae, cosmology, God, The Great Anonymous.*

Introduction

From the many titles held by these two great colossi of the philosophical and theological literature of our nation, respectively, it is necessary to stop at the title of philosopher of Mr. Lucian Blaga and at the title of theologian of Father Dumitru Staniloae. The analysis of the life of these gentlemen shows a beautiful activity carried out in the "spirit of the nib of the fountain-pen", which often offered to the world perhaps the most beautiful writings in the field of philosophy and theology. Both authors stand out through a noble experience of the words masterfully lined up in their writings, one in the spirit of philosophical ideas, and another in the Spirit of Christ. Although both ways of life are based on the belief in carefully crafted ideas, the difference between them consists only in the distinct relationship of man with God, a relationship that each of them fulfils in the spirit of each person's faith.

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Thus, the great philosopher Lucian Blaga, living in the world of philosophy, relates to God and relates God to man in a way characteristic for the world of ideas, while the theologian and priest Dumitru Staniloae, by living in the Spirit of God's love, presents the same relationship between the Divine and the human, only in totally different terms. One highlights the love of ideas, the other the love of truly living in God.

The meeting between these two great thinkers in the presentation of cosmology denotes, naturally, two different views, springing from the way of thinking and living of each. Here appears also the beauty of the mystery they express, one talking about God and the other talking with God. The difference of the perception of God in philosophy compared with the one in theology is fantastic, and the present article aims at highlighting the two perceptions, in order to bring to light the truth of existence in general and of man in particular, of course by referring to the work of the two great thinkers. In this point of apparent convergence of the two enlightened minds of the Romanian people, the existence of truth must be proved, either in philosophy or in theology.

Cosmosophy of Philosophy - Lucian Blaga

Although Mr. Lucian Blaga formulates a philosophy with nuances close to the Christian experience, by expressing the existence of the *Great Anonymous*, the theological analysis made by Father Staniloae demonstrates the inability of philosophy to encompass in words the greatness of God.

The work entitled "Divine Differentials. Anthropological Aspects. The Historical Being", signed by the great Romanian philosopher, is the one that presents the philosophical comprehension of God of this respective thinker, a comprehension that is in clear contradiction with the thinking of theology. The Great Anonymous of Mr. Blaga's philosophy proves to be a selfish concept, defined as contrary to the knowledge man has of Him. This first idea of philosophy is in direct contradiction with the theology of Father Staniloae, who emphasizes a God of love, a God who wants the salvation of man, a fact proven historically by the act of the incarnation of Christ. This form of closeness between the Divine and the human, through the incarnation of the Son of God, is so intimate that the communion between men and the Creator remains forever.

The personal character of the Great Anonymous is totally neglected, hence it turns out that he is impersonal, so an indefinable power, incapable of communion and love. This conception of philosophy has

immediate effects in terms of human freedom, the choice between good and evil, turning everything into an automatism guided by an impersonal force.

The above-mentioned work, which wants to express a philosophical theory about the origin and being of the world, describes the Great Anonymous as having an incomprehensible power, a power through which He can reproduce Himself infinitely. According to Mr. Blaga's theory, the climax of supreme existence can only be to give existence to beings equal to him. Although this is a purpose in itself, he resists this capacity, precisely out of the desire to be the absolute, unique existence. This concern, based on egocentrism, defines the creation of the world as a negative act, resulting from the abstinence from the non-reproduction of beings completely equal to him. Therefore, the egocentric abstinence leads to the creation of the world, a creation that is not at all comparable to the Great Anonymous. "The will of the Great Anonymous, as an effort, is not directed towards creation, but has as objective precisely the prevention of a too great generating magnitude."¹

The false theology that would result from this philosophical idea is that God the Father is the uni-personal existence, defined by egocentrism that does not allow the birth of the Son and the proceeding of the Holy Spirit from eternity, so that there are no beings equal to Himself, because according to philosophical theory, The Great Anonymous, giving existence to the first beings equal to himself, could not stop from doing it again, resulting in multiple autonomous existences.

Another point of divergence between Mr. Blaga's philosophy and his theology is found in the theory of creation. According to philosophy, the world is a kind of emanation from God, the creation "ex nihilo" not being taken into consideration. If the creator of philosophical ideology neither creates from nothing nor models a given matter, it follows that all creation is the effect of "reproductive acts."² However, the term reproduction, and moreover no other terminology in the empirical field, can define the act by which the world comes into existence, the most appropriate term from the perspective of philosophy being that of "emanation". However, this emanation does not mean a multiplication of the essence, either, but only of something secondary from the Great Anonymous.

¹Lucian Blaga, *The Divine Differentials. Anthropological Aspects. Historical Existence*, Bucharest, Humanitas Publishing House 2015, p. 31 (Romanian version).

² Ibidem, p. 30.

These emanations from the Great Anonymous are called in the philosophy of Mr. Blaga *divine differentials*. "Any of these divine differentials is a substantial minimum, bearing a structure equal to an absolutely simple segment of the divine structure. The divine differential, however, being a substantial minimum, can only be the bearer of a virtual structure. From a substantial angle, the divine differentials allow to be imagined symbolically through a series of points"³. From here we understand that the Great Anonymous reproduces Himself continuously through these differentials, and the classification of their importance results from the greater or lesser distance from the unique essence.

Starting from the philosophy of differentials, we understand that the world is not a creation of the Great Anonymous, but everything that exists; it is just the effect of integrating all the differentials. So, the creation of everything that exists does not involve the intervention of a creator, but is a simple causal effect. If there is no personal creator, it results that the whole of creation is subject to corruption and destruction, each consciousness being subjected to this fateful destiny. The immortality of the soul does not exist. "What is left after individual death are these mental differential secrets, but not the consciousness and not any alleged individual soul, as a total and indivisible factor, which would have been in the possession of consciousness, or perhaps even identical to it."⁴

In order to explain the presence of the organic world, Blaga's cosmology makes up a system of intertwining differentials the finalist creatures come from. Of course, perfection does not exist in this interpenetration, which means that the final product is not perfect either. Also through this system we try to explain the transformism of species resulting from the state of complementarity between differentials and environmental influences. The result of this theory is that all that exists has finality, and the Great Anonymous has no contribution to the creation of those that exist.

Mr. Blaga's cosmology sees the whole creation in general and man in particular as elements of a complex system, a system based on a law according to which it is governed. This law denotes an automatism in which the will does not exist. Man lives automatically on the basis of predefined laws. "Principles such as fatalism of the fall, freedom, matter,

³ Ibidem, p. 36.

⁴ Ibidem, p. 167.

etc., limit in fact the divinity on the outside and inopportunately multiply and against the postulates of intelligence, the explanatory elements”⁵.

In the absence of a principle of conscience, the idea of sin is excluded, man being governed by laws. However, this philosophical system reaches a point where it highlights a paradoxical aspect. On the one hand, man exists in the closest position to the Great Anonymous, and on the other hand, the Great Anonymous is afraid of man, so that he does not reach the resemblance to him. The effect of this fear, according to Mr. Blaga's philosophy, is the barrier created by the Great Anonymous, man not being able to perfect himself in knowledge. This effect is called transcendent censorship, which aims to thwart the revelation of mysteries.

The contradictory state in which man defines himself as existence is based on the nature of the higher differentials that compose and lead him to the Great Anonymous on the one hand, and the action by which the Great Anonymous rejects man, so that the latter does not rise to an equal existential state. The consequence is that the Great Anonymous's fear is the most important element of existence, an element that keeps man attracted to him, as far away from him as possible. Everything can be defined as a permanent struggle between the divine and the human, a struggle that the human loses every time.

Of course, since man does not have the freedom of conscience, and is always subjected to the laws inserted in him through the interweaving of divine differentials, “man's destiny is to live steadily in this assault always thwarted by its very means. History is, through each of its moments, this existence of great intentions, which breaks in itself, because the only means of fulfilment that are at its disposal are constantly turned against it. History has no purpose, no terminus, to aspire to and to be at its end somewhere in the future.”⁶

The Cosmology of Theology - Pr. Dumitru Stăniloae

The philosophy of the great thinker Lucian Blaga, although it could have initially been defined as a philosophy of the mystery of the personal being, it comes nevertheless to be defined as a philosophy of impersonal things. His philosophy is positioned in explaining the relationship between the divine and creation in general and between the divine and the human in particular, from an intellectualist position, from a perspective

⁵ Ibidem, p. 157.

⁶ Ibidem, p. 189.

that denotes an attitude of sovereign superiority, an attitude by which reality is divided and mixed for arguing for his own philosophy. Such a philosophy positions the thinker outside of creation, highlighting him as an analyst outside of creation. Such a philosophical attitude is highlighted by Gabriel Marcel when he says: "the more we treat the world as a show, the more it must necessarily become metaphysically unintelligible."⁷

From a theological perspective, man is a wonderful mystery, of a depth difficult to encompass in definitions. Man is freedom, love, responsibility, and most importantly, capable of dialogue with God. The beauty of creation and man cannot be grasped by reason, for reason is finite, limited, but is understood through those personal qualities, often disregarded by what we call philosophy. Only the I-you-he relationship is the one that gives reason a meaning and a limitation based on reality. Without this relationship, the intellect can continually imagine, formulating different theories from person to person, theories that would try to define the same thing. Thus, without the personal qualities guaranteed by reality, an object can have unlimited definitions, definitions resulting from the thinking of every individual.

All these proud explanations of philosophy, having no foundation in reality, but only in the world of ideas, prove incapable of demonstrations when reality enters the equation. The person is the one through whom philosophical ideas collide with reality and through the person we become aware of the reality of all created things. "The certainty about the existence of other things is for me mediated by the certainty about the existence of other people besides me"⁸. It follows that "in love and in everyday feelings lies the true proof of reality, of what is outside of me"⁹.

Man's superiority over objects and substances, the ability of a person to relate to another person in the sense of equality, the security it offers regarding his external reality, are just a few arguments that show that God cannot be thought of as substance, but it is absolutely necessary for Him to be a Person. Human reason, although limited in knowledge, cannot define itself as reason if it places God in the category of things.

Being Personal by definition, God cannot be known through philosophical analysis, but through love. Just as such a state of love is

⁷ Gabriel Marcel, *Être et Avoir*, Paris, Aubiers-Montaigne Publishing House, 1935, p. 22.

⁸ Karl Löwith, *Das Individuum in der Rolle des Mitmenschen*, München, 1928, p. 41.

⁹ Ibidem, p. 9.

achieved between human beings, in the same way man's closeness to God is achieved through mutually manifested love. Thus, a human person, even submitted to limits, has the ability to enter into a dialogue based on love with the Personal God, the Creator of all that exists. He, having everything in Himself, does not depend on our love, but we, being limited by reason, depend on His love, love through which we overcome in understanding and feeling the barriers imposed by reason. That is why reason cannot explain what man feels and lives in the love of God. "The Personal Character of God describes Him as the Creator of all that exists, not of a pre-existing matter, but *ex nihilo*"¹⁰.

Mr. Blaga's philosophical thinking brings to the fore a God devoid of two qualities: will and love. If man, as a limited being, possesses them, all the more so the One who created man. The cancellation of the character of Person of God defines Him as anything but as a person. Hence the inability of God, according to philosophical thought, to have personal character, will, feeling, and love. Moreover, the latter attribute defines in theology the degree of perfection of a person. Love is the foundation of happiness, and man cannot define himself outside the constant pursuit of happiness. Therefore, through love, man accesses the knowledge and feeling of happiness, the understanding of the other and the fulfilment of communion with the other. Without communion between people, which is based on love, man becomes a closed "I" who cannot know happiness.

God being the love itself, He is from eternity a communion of Persons. His state of perfection is absolute. It cannot be like the state of perfection towards which man tends, a state that can be reached in time. God is eternal perfection. From the manifestation of love, manifestation always in relation to the divine will, God the Father, from eternity, gives birth to the Son and proceeds the Holy Spirit. The will-love relationship in God is perfect, which means that God can reproduce Himself voluntarily, consciously, "without being in danger of not being able to stop"¹¹.

Love between Divine Persons highlights the lack of egocentrism. Besides, God could not express himself as love, for this cannot be expressed in a single *I*. There is always a need for a *you*, in the act of manifesting love, and perfection is expressed through a *him*. In the I-you

¹⁰ Pr. Prof. PhD. Dumitru Stăniloae, *The Orthodox Dogmatic Theology*, The Publishing House of the Biblical and Missionary Institute of the Romanian Orthodox Church, Bucharest, 2003, p. 362 (Romanian version).

¹¹ *Ibidem*, p. 370.

love relationship there is a reciprocity, which completes the act of love only by relating to a him. Thus in the Holy Trinity, the Father loves the Son and the Holy Spirit, the Son loves the Father and the Holy Spirit, and the Spirit answers perfectly to the love of the Father and the Son.

God cannot be mono-personal. This attempt made by philosophy to formulate a theory that God is one Person, makes the Great Anonymous subject to time and decisions made in time, and this involves many consequences related to the limitations that appear in God.

By the fact that God is a Trinity of persons, consubstantial Persons, we can perfectly express the beauty of communion in love through the intra-Trinitarian relationship, and in a limited but sufficient way in order to bring happiness in the God-man relationship.

The ex nihilo creation of the world in general and of man in particular, calls into question two things: the personal character of the Creator who, of His free will, creates human persons, and the creation that has love as foundation, so that human beings may be in communion with Him.

The idea expressed by Mr. Blaga's philosophy that the Great Anonymous is characterized by the fear of being dethroned, either by an existence equal to him or by man, which he constantly stops evolving, is totally unacceptable. The world is not created by the helplessness of God and His external parts, but by an absolute love that desires through an eternal will that human beings participate in happiness. That is why God freely creates a free world, in which human persons are fully aware of their freedom, and He does not hide in His transcendence from the fear of created persons, but comes in close proximity to them, due to the desire for communion in love. The act of communion between the Divine and the human is not necessary to the Holy Trinity, which as Absolute God holds in Him everything, but is necessary to man. The philosophical view positions creation without a purpose, everything is suffering and effort both from the part of the Great Anonymous and from the part of man, without any grounds for it.

From the feeling and experience of man in the love of God results the main purpose of man: to reach the likeness in grace with God. Man's immortality acquires a meaning only related to the love and eternity of the Creator, Who makes man not to die, but to be alive forever. This eternal life gives meaning to the world. In man there is a need for communion with the Creator, a fact proved by the human desire to taste happiness. If earthly happiness is relative, and man is in constant search, the happiness of communion with God in eternal life is immeasurably greater than any

earthly happiness. Hence the existence of eternal life which, in the relationship between God and man, acquires a completely different meaning.

It is obvious that the assertion made by philosophy, that there can be no continuity of consciousness after death, is based on the intellectual limitation to external processes only. The internal experience given by the feeling of the soul gives a completely different meaning to existence. In fact, God being eternal, He creates man "in His own image and likeness" (Genesis 3:15), so with an immortal soul, capable of dialogue in the eternal love of the Creator.¹²

The world is not an emanation of God, of His essence, for if God tore out of Himself external parts, as philosophy states, He would cease to be whole, and all the parts out of Him, of which speaks Mr. Blaga, would form an eternal matter, from which two equal principles result in eternity: God and matter.

According to theology, God is whole, having everything in Himself and through Himself, and the whole creation is not an emanation of His Being, but is created from nothing, according to the decision taken forever by God, a decision based on love. God is the Trinity of Persons, and love is absolute. From this love springs the Creator's generosity to create human beings to participate in love. Fear and wickedness, the constant struggle that philosophy presents, have no foundation. If the world is the negative product of the Great Anonymous, a product with which he constantly struggles not to be dethroned, it denotes that the Great Anonymous is not omnipotent; because the production, even negative of the world, shows that it is not in his will.

The problem of indestructible differentials that are asserted in philosophy is also dismantled by science which proves that the atom can be broken into protons and electrons. Their mathematical variation offers as a result all the chemical elements and all the substances. From the analysis of the scientific data, corroborated with the data of the divine Revelation, we can conclude that all lead to a single power, of the One Creator, Who creates ex nihilo all that exists.

¹² Prof. N. Chițescu, Pr. Prof. Isidor Todoran, Pr. Prof. I. Petreună, *Dogmatic and Symbolic Theology*, Renașterea Publishing House, Cluj-Napoca, 2005, p. 121 (Romanian version).

Conclusions

God is love by definition. He creates everything from nothing with free will, he creates human beings not out of a personal need, but only as a result of the desire for everyone to participate in eternal love and happiness. He cannot be self-centred, for he would no longer be God. His absolute power is not demonstrated by force and terror, as Mr. Blaga's philosophy proposes, but by the call addressed to all to feel and live in His love. Man is a material body, but also a spiritual soul, a soul through which he feels both the love of other people and the love of God, and has the ability to respond to this love. The philosophical concept of the Great Anonymous nullifies the capacity to love, and implicitly eliminates from discussion the eternity of the human soul and the possibility of participating in happiness. Without the real relationship that theology achieves between the Divine and the human, man can no longer define himself as a person, but as an egocentric individual. The person is defined by love, the individual is not. Therefore, the representation of man in theology as a person, capable of love and dialogue with God, denotes that the greatest quality that man can have is to be according to the model of the Creator, that is, love. From this feeling raises the compassion for the other, the desire to be close to the one in suffering and most importantly, the state of sacrifice for the other. Without love man would only be "a simple rational animal, which comes from nowhere and goes nowhere"¹³.

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¹³ Petre Țuțea, *Man - a Treatise of Christian Anthropology*, Publishing Timpul, 2001, p. 25.

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THE CONCEPT OF INCARNATION IN PHILOSOPHICAL AND RELIGIOUS TRADITIONS

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Abstract: *Incarnation, as defined in its simplistic form, in which God assumes a human nature, is at the heart of Christian doctrine. The uniqueness of the Incarnation, in Christian doctrine as opposed to other religious traditions, is incorporated into and among other Bible texts and into the Gospel according to John 1:1–18.¹ This article will discuss some of the philosophies that existed at the time, which supposedly influenced the Gospel of Saint John.*

Thus, we will try to understand how some of these philosophies interpret incarnation in forms that do not necessarily reflect incarnation² as is traditionally understood in Christianity (where God becomes flesh).

This article opted for a special structure of consolidation, primarily from the belief that the Gospel of John differs from historical and contemporary philosophical tradition to the time it was written and therefore begins with the removal of Gnostic philosophies and teachings that have been assimilated in the Gospel of John. This indicated the independence and uniqueness of the writing of the evangelist John.³ The article also provides a list of fundamental beliefs by Christians of incarnate logos also supported by some historians the first and second century.

These beliefs are then compared to concepts such as theophany, apotheosis, theosis, deification, canonization, anthropomorphism, to which Huxley is alluded to, as being equated with logos.⁴

Keywords: *Incarnation, Assumption of Humanity, Human Indignity, Logos.*

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¹ The Holy Scripture, *Holy Gospel after John*, Publishing House of the Biblical Institute and Orthodox Mission, 2019, p. 1316.

² The word "incarnation" is sometimes used incorrectly to refer to the "appearances" of the gods in the form of humans or animals on earth.

³ Danijel Casni Christ: *The Incarnate Logos, Kairos: Evangelical Journal of Theology*, 9(2), pp. 187–199, supports this uniqueness by providing an excellent exegetic study of the prologue to the Gospel of John, with reference to logos. He states that there is a latent revelation in this prologue to trinitarian logos. He says that "in the beginning it was the Word (i. e. the Holy Spirit) and the Word (i.e. the Son Word) was with God, and the Word was God (i.e. the Father)". In support of this revelation, he explores the lexical and stylistic characteristics of this prologue and structure.

⁴ A. Huxley, *The Perennial Philosophy*, Chatto & Windus, London, 1947, p. 60.

Philosophy and possible influence on the Gospel of Saint John

A very common philosophical concept, with which the Gospel of John (1:1-18) has always been associated, was the philosophical idea of *Logos*. Biblical philosophers and exegetes had different opinions about the influence of the concept of Logos on John's Gospel, although most agreed that its author would have had an understanding of the concept of Logos.⁵ There are many theories presented by different scholars about the philosophies that might have influenced the writing of the evangelist John,⁶ but the intention is to address some of these philosophies that might have prompted the writer to express himself through them. This approach is intended to extrapolate the text in question, not only in relation to the philosophical theories of the time, but also in relation to those philosophies that may have an impact on an interpretation of the Incarnation within its ideology.

There are two prominent sources of philosophical thinking that could have had a rudimentary impact on the evangelical pericope or, as Brown⁷ suggests, it could be a combination of philosophy and religion. Philosophical thinking would be: Greek (Elenism) and Judaism, and religious thinking would be expressed through mystical religions and Gnosticism. Gnostic religions, such as hermeticism and mandaeism, did not prove prominent until after the first century of Christianity and, as such, could not have had an influence on the writing of the gospel in which the the Incarnation of God is surprised.⁸

According to Brown, the text concerning the Incarnation of God was "characterized as a Hellenistic gospel." He supports this obvious observation, referring to abstract concepts such as *light* and *truth*, in which dualistic trends as light and darkness, truth and lies and even his concept of logos are found.⁹

⁵ O. Cullman, *The Christology of the New Testament*, SCM Press, London, 1980, pp. 258-259.

⁶ These Greco-Roman and Jewish philosophies theorized the concept of logos as "universal mind" (Heraclitus 550-480 î.Hr.) as "reason" (Platon 427-347 î.Hr.) as "logical" (Aristotle 384-322 î.Hr.) as "active divine principle" (Stoicism 300 î.Hr.)

⁷ E.R. Brown, *An introduction to the New Testament*, Doubleday, New York, 1997, p. 371.

⁸ A. Tripolitus, *Religions of the Hellenistic-Roman Age*, Eerdmans Publishing, Grand Rapids, 2002, p. 135.

⁹ E.R. Brown, *An introduction to the New Testament*, Doubleday, New York, 1997, p. 371.

Keeping the same opinion, Smalley believes that Plato's main idea of philosophy is centered on the dualistic contrasts between the invisible, "real" world beyond time (above) and his inferior copy in this world of time (bottom). Allied to this basic conception and which derives from it, is the contrast between the superior mind of man and the lower body and the notion of perfection, as the mind released by contemplation from its material limits, in order to unite with the true reality in God.¹⁰

In Platonism, we find this understanding that the earthly realm is a temporary one compared to the heavenly realm, which is considered to be an eternal one. Does the Gospel of John not support this philosophy when the writer refers to Jesus who says, "You belong to this world down here, but I come from above"? (John 8:23).¹¹ Therefore, this whole idea of what descends from above (from the sky) is real and true, and this form of contrasts in Platonism, according to Brown, defines a "real, invisible and eternal world, in contrast to the world of lower appearance."¹²

Similarly, *Corpus Hermeticum* presents a cosmogony of the world, developing from the Divine Light and through the divine intellect.¹³ The birth of the cosmos begins as a land of spiritual powers. As this light descends, it becomes darker, this light is designed as Logos. Corey explains that the logos of light and life descend into the natural world, causing the spirit, fire, and air to rise, while the earth and water begin to move in a circular motion.

This understanding above may be a development of the philosophical conceptual interpretation of the logos. The word logos has several meanings. The most common meaning in Greco-Roman and Jewish culture is reason, thought and speech. However, according to Hillar¹⁴, Logos-Word, is used as an expression in Greek philosophy to designate: a rational, intelligent, life-maker principle of the universe, this principle being inferred from an analogy with the living creature, because the ancient Greeks understood the universe as a living reality according to their faith.

¹⁰ S. Smalley, *John: Evangelist and interpreter*, Paternoster Press, UK, 1994, p. 43.

¹¹ The Holy Scripture, *Holy Gospel after John*, Publishing House of the Biblical Institute and Orthodox Mission, 2019, p. 1329.

¹² E.R.Brown, *The Gospel according to John (I-XII)*, Doubleday, New York, 1966, p. 58.

¹³ J.L.Corey, *Light from light. Cosmology and the Theology of the Logos*, Fortress Press, Minneapolis, 2016, p. 57.

¹⁴ M. Hillar, *From Logos to Trinity: The Evolution of Religious Beliefs from Pythagoras to Tertullian*, Cambridge University Press, 2012, Cambridge, p. 6.

The paradigm of logos as a metaphysical concept was developed by Heraclitus (d. 475 î.Hr.). He was probably the first philosopher to use this concept both philosophically and theologically. He argued that, between all things, there is a mysterious connection between opposites, which produces a dynamic balance. An example is the idea of sea water. Seawater, drunk by humans is harmful, but fish live in seawater. Seawater, therefore, seen as positive and negative, produces a dynamic balance.

For Heraclitus, the connection between these opus concepts is the product of a "universal mind," or Logos, "according to which all things in the world happen".¹⁵ Although the world is in a state of flux, the basic principle that brings order is this "universal mind". Logos, therefore, according to Heraclitus, is the principle of organization of the universe.

In this understanding, there is no reference to an incarnate being similar to the understanding of the Logos in the Gospel of John. From this point of view, there is the premise that Plato's philosophy is closest to the Christian doctrine of The Logos. This can be recognized, if Plato's logos symbolize God's trinitarian idea in Christianity, where Plato refers to the ontological distinction between the eternal and intelligible world of Form and Ideas and the perceptible world.¹⁶

Drozdek, in explaining the concept of forms and ideas and good in Plato's philosophy, makes the following remark, especially regarding the idea of good, as a peak in the hierarchical structure, that "The world of ideas is in the same hierarchy as the idea of good. This is more important than other ideas, because other ideas depend on it and their "being and essence" come from it." The idea of well is referred to as logos,¹⁷ so we can say that in Plato's philosophy, the logos, is not equivalent to the divine principle, embodied as a human being, similar to the understanding of the Logos in the Gospel of Saint John.

The Stoics developed the concept of logos, to speak of it as the primary reason by which all things came to life, by which all things were ordered and to which all things returned.¹⁸ Philo used the concept of logos

¹⁵ *Ibidem*, p. 10.

¹⁶ D. Časni, *Christ, The Logos Incarnate*, Kairos: Evangelical Journal of Theology, 2015, 9(2), pp. 187-199.

¹⁷ A. Drozdek, *Greek Philosophers as Theologians: the divine arche*, Ashgate, Aldershot, p. 154.

¹⁸ K. Funk, *Concerning the Logos*, 1996, available online at <http://engr.oregonstate.edu/~funk/Personal/logos.htm>

by associating it with the Jewish conception of God seen as the Proniator and Creator of the universe, this concept serving as an intermediary between God and the world.¹⁹

This notion of logos as an intermediary found support in Dodd's conception²⁰, which analyzed Philo's contribution to Judaism, to assume that logos are "the environment of intimacy between God and this world". This must be understood in the platonic idea of the dualistic contrasts between the invisible world, "real" beyond time (above) as its form and ideas and its inferior copy in this world of time (below), the perceptible world.

Funk²¹ sums up this idea of Philo who has used the term logos more than 1300 times in his writings and suggests that Philo refers to logos as "the divine reason, through participation, by which people are rational, the model of the universe and the firstborn of God."

These opinions reflect part of the development of the concept of logos in different eras by different philosophies. The concept of logos developed from the time of Heraclitis to Philo, although allegorical is engaged in the Jewish tradition. Allegorical interpretation was a popular method of synthesis of Greek and Hebrew thoughts. It has also been suggested that there is no absolute factual evidence, that the author of the Gospel (John) was influenced by these philosophical ideas about logos, included in those philosophies.

Having addressed some of the philosophies that were suspected of having some influence on the writing of the Gospel of John, it can be found that the author and his interpretation of the concept of Logos in the Gospel, stands in contrast to the prevailing idea of logos in the philosophies before and possibly during the writing of the gospel. This (John) seems to have answered in clear terms that the Logos is indeed God who has incarnated as a body and is now the mediator between humanity and God. The logo is indeed righteous or real and the true light that cannot be compared to the world below. Therefore, understanding the Incarnation of the Gospel could, in many ways, present a development different from understanding the logos in philosophy.

¹⁹ A. Tripolitus, *Religions of the Hellenistic-Roman Age*, Eerdmans Publishing, Grand Rapids, 2002, p. 80.

²⁰ C.H., Dodd, *The interpretation of the Fourth Gospel*, University Press, Cambridge, 1985, p. 68.

²¹ K. Funk, *Concerning the Logos*, 1996, available online at <http://engr.oregonstate.edu/~funk/Personal/logos.htm>

Christian understanding of the Incarnation compared to other religions

An exegesis of the text in question, in Holy Scripture, John 1:1-18,²² explains in clear terms what the Logos is, the origin, the purpose for which humanity descends, and what it has achieved for humanity, and that is why we have used the apophatic approach to conceive an understanding of Jesus Christ as the Incarnate Logos (1. Jesus is not a hybrid. He wasn't half-human and half-God. He was fully God and fully human. Jesus was not a demigod. 2. He was not a mythological being with more power than humans, and less power than God. 3. The incarnation of Jesus was a singular and unrepeatable event. 4. The appearance of Jesus on earth was not a theophany but, the birth was real, historical. 5. Jesus was not an apotheosis or theosis. He was not transformed or united into a God but, He was God. 6. He died like any human being, but was raised to life thus fulfilling His purpose and mission on earth and returning from where he came only to promise that He would return).

These basic principles of God's Christian understanding are indisputable, based on the teachings of Holy Scripture but also attested in history by historians such as Flavius Josephus (47-100 CE), Pliny (61-113CE) and Tacitus (56-120 CE).

To affirm that God has made himself human and that His humanity possesses the characteristics of his own human nature is to say that the Incarnation is a cosmic event. Man was created as the master of the cosmos and was called by the Creator to draw all creation to God. His failure to do so was a cosmic catastrophe that could only be directed by the Creator Himself.²³

The incarnation of the Word (God), also brought the restoration and ontological renewal of all nature and creation present in man, in Adam, but also in Jesus Christ by the assumed human nature, for what happens in the human nature of Christ is reflected both on all men and on the creation itself. Through the divine humanity of Christ we have the highest degree of presence of the Word of God in creatures. The divine reasons of

²² The Holy Scripture, *Holy Gospel after John*, Publishing House of the Biblical Institute and Orthodox Mission, 2019, p. 1316.

²³ John Meyendorff, *Byzantine Theology. Historical Trends and Doctrinal Themes*, Publishing House of the Biblical and Mission Institute of the Romanian Orthodox Church, 1996, pp. 203-204.

things rediscover their deep senses to the renewed man through the incarnation of the Supreme Reason, the Logos.²⁴

Saint Gregory of Nazianz realized that the Incarnation is the work specific to the Son. He exposes the Son's iconography in words of great theological expressiveness. Divine iconography is a new creation of the world, namely its return to the primordial state. This, however, is not done by the sharing of God's gift from a distance or word, but by the Incarnation of the Son of God.

Saint Gregory observes in particular the consequences of the Incarnation for the salvation of man. The Son of God is made the Son of man, that is, he is a part of the created nature, taking human flesh and soul. First there is a sharing of the Word with our nature, that is, God is made a man like us, but God's descent to the state of man means the possibility of man ascending to the state of God. Taking our nature the Word has shared with man His Godhead, and thus man is made like God, He became a man for man.²⁵

In the person of the Word, the communion between God and man is restored, between the human nature and the godly nature. The first gods, the other is worshipped, one humbles and gives, the other is divided and high.²⁶ Therefore, the Word makes us like God, the Word of God, by being a part of the poverty of our nature, we have fulfilled ourselves with the richness of His grace.

In His body, man was resided and born for a new life. Through the Incarnation, the old man renews himself, dressing in the Spirit of Christ. It is not a simple moral restoration of the old man, but a renewal of the spiritual state of the created man, for Saint Gregory says that God made man to receive the Son in him.²⁷ We are indeed recalled and restored to our state from the beginning, but more than that, we are glorified with Him, for we do not rise to heaven alone, but with Christ, who carries in

²⁴ Ioan Mircea, *The Godliness of the Believer. Biblical, patristic and religious Orthodox testimonies*, in "Orthodoxy", year XXXVIII, 1975, no. 2 (April-June), 323.

²⁵ Saint Gregory of Nazianz, *Speech 38.13*, PG 36, Col. 330 D; Epistle 102, PG 36, 197 C.

²⁶ Commenting on the Ionic text "And the Word of the Flesh was made" (In. 1, 14) Saint Gregory of Nazianz states that the Incarnate Logos did not change his godly nature, but "took the oppressor – and what it was not, that the uncontained might be contained, living with us, through the intercession of the flesh, placed as a curtain between him and us, for it was not possible for nature, that those in birth and in corruption might bear the hatred of God, cf. *Speech 38.13*, PG 36, col. 330 A.

²⁷ *Ibidem*.

His image our nature. Therefore, says Saint Gregory of Nazianz that what is most important in the act of Incarnation is that Christ "fills the world from above"²⁸ that is, raises all mankind to heaven with Him.

The incarnation of the Logos-Word and not of another person in the Holy Trinity is closely linked to Saint Gregory of Nyssa, to the idea of creation. "Because the old creation deteriorated by turning to nothingness, a new creation had to take place in Christ, as the Apostle says (Col. 3, 9-10²⁹; II Cor.1, 5-17³⁰). For One is the Creator of human nature and at first and after, taking the dust from the earth created man; again taking the dust from the Virgin, He did not simply create man, but created it in Himself. Then He created, now He was created, then the Word made man, now the Word became Man so that He would turn man to the Spirit by participating in our body and blood. Therefore, the first-born of this new creation is Christ, and He himself is the one who led this face of birth, becoming a scoundrel for those who are born to life and to those who receive life through death."³¹

Incarnation is an act of God's almightiness, it is the act of a God whose power is not limited, in a transcendence where all contact with mankind is absent. For Saint Gregory of Nyssa, Christ was not a heavenly man, but having a body, He was a Man like all others, a concrete Man, who for us was all done, according to the iconography, that is, accepted to be all to man, deliberately, freely and consciously.

It is not, therefore, a shame that God came and incarnated concretely, historically in the world, because He came in what was His, not in something foreign.³² Through incarnation, therefore, God willed to make a change in man's attitude toward Him. Revelation through Incarnation wants man to turn his way, so that he can find the true way of owning life, wisdom, and truth. This will only be possible through true faith in Him who is all this by His nature.

²⁸ Saint Gregory of Nazianz, *Speech 38.2*, PG 36, Col. 313 B.

²⁹ The Holy Scripture, *Epistle to the Colossians of the Holy Apostle Paul*, Publishing House of the Biblical Institute and Orthodox Mission, 2019, p. 1467.

³⁰ The Holy Scripture, *Second Epistle to the Corinthians of the Holy Apostle Paul*, Publishing House of the Biblical Institute and Orthodox Mission, 2019, p. 1432.

³¹ Saint Gregory of Nyssa, *Great Catethetic Word*, VIII, PG 45, 33 BC.

³² Saint Gregory of Nyssa, *At the Ascension of Christ*, PG 46, Col. 692 C.

Conclusion

The incarnation of the Logos and the Eternal Son of God is the pinnacle of God's Discovery and the center of all the teaching of the Capadocian Holy Fathers. When God became A Man in Jesus Christ, then man's vocation to become God by grace was most fully clarified. The supreme dignity of man lies not in the fact that he is a synthesis of the sensitive (material) and spiritual world, a microcosm, but in the fact that he is created in the image of God the Eternal One and, as such, has inscribed in his own vocation eternal living with God.

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AN INVESTIGATION OF ECOLITERACY AND IGBO COSMOLOGY IN CHINUA ACHEBE'S ARROW OF GOD

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Abstract: *The study interrogates the relationship that exists between language, literacy and the environment given the fact that the need for its sustainability is of essence especially in the contemporary times. This paper investigates eco-literacy in Achebe's literary corpus Arrow of God. Findings suggest that long before campaign for environmental protection became a global trend, Igbo societies have made significant in road towards saving the biosphere from harmful effects due largely to human induced activities. These attempts are made manifest through traditional religion, myth, superstition and other cultural practices. The researchers' contend that though the Igbos' contribution may be deemed insignificant compared to the enormity of the emerging issues, it is still not out of place to assume that the present imput by government, and other agencies towards this direction are rather complementary to the efforts being made by the Igbo societies. The study adopts the Butterfly Effect and Chaos Theory for the inquiry and concludes that if the colonizers had known the thoughts of the Igbo concerning the ecosystem, they would have probably helped to strengthen eco-literacy ideology using natural and sustainable in road already created. The study recommends the need to revert back to some of these natural means wwhich could help to sustain the environment.*

Keywords: *Eco-literacy, Ecology, Culture, Superstition, Igbo Cosmology, Biosphere.*

Introduction

In their argument that the terms environmental literacy, ecological literacy and Eco literacy have been arbitrarily used to the extent that they have lost their conceptual meanings, McBride B.B., Brewer, C.A. & others

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submits that “the concept of literacy has evolved considerably from its origin which is the ability to read and write”¹ . But expectations for a literate citizenry have been extended to include the ability to understand, make informed decisions, and act with respect to complex topics, challenges and issues facing society today. The term literacy has also been extended to refer to such knowledge and capabilities in many different discourses like computer literacy, mathematical literacy, cultural literacy, arts literacy and ecological linguistics among others. Additional notions of literacy that have emerged are environmental literacy, ecological literacy, and Eco literacy.

Eco literacy can be viewed as understanding nature’s systems that helps to make life on earth possible. It originates from being conscious of how living systems operate in their environment. In the simplest language, Eco literacy can also be captured as “when we empower, by impacting the Eco literate world view on other members of the community”² We shall have a little digression so as to explain certain cultural practices whose contributions would be of greater effect towards environmental protection, in line with the Butterfly Effect and Chaos theory for this treatise. In the present times, studies in Ecocriticism is beginning to gain ground even among the Igbo people whose knowledge of the subject has been part of their everyday life, although the term “Ecocriticism” was not known then. If Ecocriticism has to do with the investigation or interaction of the relationship between human and the natural environment, then Igbo culture shall be the leading literature for the discourse.

The absence of written culture in prehistoric Igbo has deprived the Igbo/Africa of their rightful place among nations in terms of inventions, and discoveries³. This is despite the fact that the colonizers took advantage of the limitations of African orality, and the low self-esteem – a natural feeling of victims captured through slavery and colonization. It could also be that the colonizers were overwhelmed when they saw the extent to

¹ B.B. McBride; C.A Brewer; A.R. Berkowitz, & W.T. Borri (Eds.) “Environmental Literacy, Ecological literacy, Eco literacy: What do We Mean and How did We get Here”? <https://doi.org/10.1890/ES13-00075.1> (2013.)

² William Graham, “What is Ecology.” www.freshvista.com, (2018).

³ Oguejiofor Omeje, “Feminism in Pre-Colonial Igboland: The Nsukka Example”. *Ikenga Journal of Institute of African Studies*. University of Nigeria, Nsukka. Vol. 19. (1). I. (2019): 259-267.

which democracy has been practiced in Nigeria⁴, which is in contrast with their experiences in Congo, derogatorily referred to as a race of sub-human beings⁵. Thus, the (colonizers) chose to use their suppressive power to guard against possible rivalry and as such accorded themselves the architect of most knowledge and theory.

Igbo people inherited the forest belt zone which the teaching of their traditional religion links with the survival of other organisms. In other words, they reasoned that a violation of the environment and its natural and traditional laws will result to the death of humanity. They therefore evolved a culture of environmental protection and not degradation. It is therefore safe to say that it is through culture that the Igbo perceive their world. Whatever that does not fit well into their culture is rejected and expunged. One can therefore agree here that culture, is expressed through socializing means which include folklore, songs, religion, indigenous technology, dances and diverse aspects of mundane and domestic activities⁶. Therefore it is apt to suggest that every Igbo activity and world view on any issue is a set of cultural product.

The Butterfly Effect and the Chaos Theory

The Butterfly effect theory is a concept invented by the American meteorologist Edward N. Lorenz, to highlight the possibility that small causes may have momentous effects⁷. The essence of the theory is to justify how the minute effects of Igbo superstitions had impacted on earth inform of protection, regulation and guidance before the colonial experiences. Originally articulated in connection with the problems of weather prediction, the butterfly theory eventually became an allegory used in very diverse contexts, many of them outside the strict realm of science. On the other hand, Chaos is the science of surprises, of the nonlinear and the unpredictable. The theory teaches us to expect the unexpectable. While most traditional science deals with supposedly predictable phenomena like gravity, electricity and chemical reactions

⁴ Elizabeth Isichei, *A History of the Igbo People*. London: Macmillan Press Ltd., (1976). <https://doi.org/10.1890/ES13-00075>, accessed August 5th, 2020.

⁵ E.N. Nwezeh, *Literature and Colonialism in Lusophone Africa*. Lagos: Centre for Black Arts and Civilization, (1986).

⁶ Krydz C. Ikwemesi, (Ed.), *Astride Memory and Desire: Peoples Culture and Development in Nigeria*. Enugu: ABIC Books, (2012).

⁷ Catherine Rouvas-Nicolis and Gregoire Nicolis, "Butterfly Effect". Scholarpedia, 4(5):1720. doi:10.4249/scholarpedia.1720, (2009).

among others, Chaos Theory deals with nonlinear things that are effectively impossible to predict or control, like weather, turbulence and so on. Chaos theory simply suggests that what appear to most people as chaos is not really chaotic, but a series of different types of orders which the human mind have not yet fully become familiar with. The term Butterfly Effect has nothing to do with real butterflies and does arise out of the study of chaotic systems either, but the correlation of the two theories arises from the unpredictability of the two phenomena. That is, while the butterfly theory sets the question “can a butterfly’s wing flap likely prevent a tornado”? Chaos theory meditates on such systems such as the weather that are extremely sensitive to initial conditions, where small changes in the past have huge outcomes in the future. Thus far, the theories have been introduced, we shall soon return to it when we take on James Frazer’s “Sympathetic Magic”.

Igbo Culture

No discussion of culture can be all embracing because it is broader than just saying that it is ‘the way of life of a people’. Even this type of definition appears ambiguous. Many people understand culture from the reductionist perspective to mean just part but not the whole of what culture entails. They limit culture to custom, art, literature⁸. For this study, we shall view culture as any or all endeavour undertaken by human beings to engage, sustain and preserve the continuation of their society. From this, one can conclude that one of the major differences between humans and animals is culture. Animals do nothing to preserve its society. It does not change its daily routine which includes eating, sleeping, at times playing and fighting, breeding and dying. It does not undergo any training, neither does it consciously undertake any course to change some of its habits in relation to emerging realities. Thus, there is no culture or civilization among animals.

Igbo culture like many other cultures has little dissimilarity depending on each community. For example, in the olden days not all Igbo traditional culture allow ritual killings except of course if the killing is to appease the god(s). That is why in Igboland there is no death penalty. The highest penalty that is given to an offender is banishment and

⁸ Chidi Ugwu, “Indigenous Strangers: Social Psychology of the Perceptions and Applications of Culture in Nigeria”. In Ikwuemesi, Krydz C. (Ed.) *Astride Memory and Desire: Peoples Culture and Development in Nigeria*. Enugu: ABIC Books, (2012).

anybody who commits suicide is to be buried by strangers. Another minor dissimilarity is that in some Igbo communities, elderly men break kolanut and pass it round, while in some other communities, it is the youngest male that usually performs such function. Most serious cultural matters and superstitions are usually tied or linked to gods or deities for protective and preservative purposes this is in view of the fact that Igbo people regard god and deities so highly that their dictates are seldom neglected. They are perceived to be the security for the living and the dead and they are not accountable to any mortal. That is why anything pertaining to god or deities in Igbo cosmology is cautiously handled. In Igbo world view, the supreme god (Ezechitoke or Chi-Ukwu) dwells above, and is in-charge of the heavenly realm and all the elements above, while the earth goddess (Ala) is in-charge of the earth and the biosphere. Any taboo against the Earth goddess (nso Ala) is usually calamitous. It ranges from individual to communal punishment which could be death, sickness, failed harvest or drying up of streams and so on.

Igbo Religion

Igbo traditional religion share many things with the basic tenets of Christian religion. Most importantly, the two religions believe in one supreme God and other smaller gods. The controversy created by church goers about the denial of other gods can be likened to mere ignorance of the textual meaning of God's commandment that "Thou shall have no other gods before me"⁹. Logically speaking, for God to warn against other gods clearly indicates there are other gods, for it would be illogical to begin to talk or warn about things that do not exist. Thus, both religions have belief in the existence of more than one god, their sacredness, altar - place of worship, Holy Communion and so on. But while the Igbo religion is natural, accommodative and evolved from and with the people, Christianity is perceived by many as domineering, hostile and imposed on the people by foreigners. Additionally, while Igbo religion has a conservative outlook, the other has a dynamic outlook.

Superstition

The problem with superstition is hinged on its lack of scientific explanation. Furthermore, most critics of Igbo religion and culture were

⁹ The Good News Bible, Today's English Version, 5th ed., New York: Swapna Printing Works, 2009.

blinded by bigotry and thus fail to see the significance of some superstitions in Igbo culture. The researchers are of the view that even Shakespeare's Rome and England had their superstition. Shakespeare's works are known to abound in the use of witches, weather prediction, fairies and ghosts (*Julius Caesar*¹⁰, *Macbeth*¹¹, *Hamlet*¹²) but for this study, examples shall be drawn only from *Arrow of God* and *Julius Caesar* for illustration so that we can return fully to the discourse on ecoliteracy.

Shakespeare's *Julius Caesar* is taken from Rome but we also know the influence of Rome on England especially in the areas of religion and social worldview. Thus, it is not out of place to see such influence spread beyond religion to the English theatre.

In Rome, it is believed for instance that, during the course of running around in celebration of Ides of March, if a fertile man touches a barren woman, she is likely to conceive, Caesar's superstition is shown in the following words to his wife Calpurnia and Mark Anthony. Caesar advises his wife Calpurnia thus: "Stand you directly in Anthonius' way when he doeth run his course...

Then to his friend mark Anthony he pleads:

Forget not in your speed, Anthonius to
touch Calpurnia, for our elders say, the barren
touched in this holy chase, shake off their
sterile curse¹³.

It is surprising that the same Julius Caesar who believes so much in superstition would suddenly turn around to neglect and discard it. Arising from this, it is apt to say that his death should be blamed on his neglect of the superstitious belief system that holds sway during his era. It is important to note that a soothsayer who claims he can foretell the future¹⁴, warned Caesar that March 15th (called the Ides of March in Roman Calendar) will be a day of danger for him that he should beware of that day. Cassius the chief conspirator in the plan to murder Caesar had doubted initially if their plan to woo Caesar to the Capitol to murder him

¹⁰ William Shakespeare, *Julius Caesar*. New York: Dover Publications, 1991.

¹¹ ----- *Hamlet*, Oxford: Oxford University Press, 1994.

¹² William Shakespeare, and R., Gibson, *Macbeth*. Cambridge: Cambridge University Press, 2005.

¹³ William Shakespeare, *Julius Caesar*, New York: Dover Publications, 1991.

¹⁴ H.M. Hulme, *Julius Caesar*, (Ed.) In "Shakespeare, William. The Complete Works". NY: Random House Value Inc., 1997.

would succeed, this is as a result of the fact that Caesar has of late, grown superstitious about the forthcoming event. Cassius concern is captured below in the following lines;

But it is doubtful yet
whether Caesar will come forth today or no;
For he is superstitious grown of late
Quite from the main opinion he held once
Of fantasy, of dreams, and ceremonies...

But the event of the night in which Calpurnia cried out in her sleep thrice heightened Caesar's superstition. To which he says:

Nor heaven nor earth have been at peace tonight:
Thrice hath Calpurnia in her sleep cried out
Help, ho! They murder Caesar...

This premonition was also felt by many others but Caesar dismissed all of them as mere superstition. In addition, when the soothsayer repeatedly cautions Caesar about the dangers ahead, Caesar charges at him and asks him who he thinks he is to ask a high ranking army general of his caliber to repeat his message three consecutive times to Beware the Ides of March, Caesar also dismisses all the claim of danger as mere superstition.

In Chinua Achebe's *Arrow of God*, Ezeulu also had dreams that are similar to that of Caesar's wife twice. The first one was during his incarceration at Okperi¹⁵; and the second one shortly before the body of his son Obika was brought home from the failed *Ogbazuluobodo* performance¹⁶. Both dreams essentially signify his portend doom. Ezeulu attributes the first dream to 'spiders on the rafters'¹⁷. Perhaps this is because he has been out of his station for a long time. The second dream could be likened to the state of his mind or his inability to make proper consultation with the gods. That same act of neglect of the underlying meanings in the dreams he had bought about his down fall.

¹⁵ Chinua Achebe, *Arrow of God*. New York: Anchor Books, 1989.

¹⁶ ---. *Arrow of God*. p. 35.

¹⁷ ---. *Arrow of God*. p. 39.

Eco-literacy in Igbo Cosmology

Eco-literacy, Eco-linguistics and Ecocriticism among other topics come under the field of ecology which Susan Feldkamp, Maureen, Kilpatric, Dawn, Spinozza and others noted, was not named until 1866¹⁸ in which case, its sub- divisions for environmental protection may not have been thought about; but has become part of the Igbo practice owing to the fact that the Igbo culture recognizes environmental protection as shall be shown in Achebe's *Arrow of God*. There is need to stress that *Arrow of God* is one of the many archetype literary works that showcase Igbo culture and worldview and examines the impact of Christianity Igboland.

The first sentence of the first chapter of *Arrow of God*, introduces Ezeulu as an astrologer. Captain Winterbottom who is the District Commissioner knows this much about the Igbo when while speaking to his colleague Mr. Tony Clarke about Boniface (Winterbottom's steward) asserts that "... by my calculation, they (the people of Umuaro) have no idea of years ... they understand seasons..." That, in Winterbottom's words connotes that the Igbo are nature historians or ecologists¹⁹ To confirm Biggs and others right, Ezeulu advises John Nwodika that it was dangerous to take shelter under a tree while it is raining²⁰, This marks Ezeulu out as someone who knows and understands more about celestial bodies. He has been in search of the moon for the third night fall; and understands that its appearance would not exceed that day, probably because he has been in the practice for many years, though it is not him that started it. His forefathers did, since it is the duty of the chief priest of Ulu to announce the arrival of the moon for planting and other traditional festivals.

Ezeulu actually sees the moon as he predicts and upon the announcement, his family and the entire village who have been expecting the news receives it with great ululation this is clearly noticeable when Ezeulu beat his gong "GOME GOME GOME GOME...", immediately children's voices took up the news on all sides. The women too were in the open talking... the next day, the six villages of Umuaro will receive the news²¹. This information evidences the fact that every Igbo community

¹⁸ Susan Feldkamp, Kilpatric Maureen, Dawn Spinozza and others.(Eds.) "Today's Environment" *In Modern Biology*. Texas: Rinehart and Winston, 2011.

¹⁹ Alton Biggs; Kathlee Gregg; Whitney Crispen Hagins and others. (Eds.) *Glencoe Biology: The Dynamics of Life*. Columbus: McGraw-Hill, 2002.

²⁰ ---. *Arrow of God*. p. 44.

²¹ ---. *Arrow of God*. p. 49.

has such traditional astrologers inform of priests representing different deities in charge of different festivals which come at different months and seasons. We can immediately appreciate the superstition that follows the moon in the following conversation between Matefi and her co-wife:

‘Oho’, I see it. Moon, may your face meeting mine bring good fortune. But how is it sitting? I don’t like its posture.

Why?’ asked Matefi.

‘I think it sits awkwardly - like an evil moon’.

‘No.’ said Matefi. ‘A bad moon does not leave anyone in doubt. Like the one under which Okuata died. Its legs were up in the air?’²².

This tells us to what extent the Igbo can read meaning from natural phenomena and occurrences. The researchers are of the view that this may probably be because they play important roles in their lives and in the protection of the environment. From here, we can examine some other superstitions and their significance in environmental protection in Igboland.

While sitting in his shrine, Ezeulu could not see through, but hears the voices of women of his household returning from the stream. So he queries:

EZEULU: Are these not the people I saw going to the stream before the sun went down?’

NWAFOR: Yes’, said. They went to Nwangene’

EZEULU: I see²³.

Ezeulu had temporarily forgotten that the nearer stream, Ota had been abandoned since the oracle announced yesterday that the enormous boulder resting on two other rocks at its source was about to fall and would take a softer pillow for its head. Until the Alusi who owned the stream and whose name it bore had been placated no one would go near it.

²²---*Arrow of God*. p. 49.

²³ ---*Arrow of God*. p. 7.

The superstition follows the oracle's announcement that the enormous boulder belonging to the Alusi (deity) that owned the Nwangene stream wants to fall and 'need human beings as a softer pillow'. From the prehistoric times to the present day, the Igbo believe that many stream, lakes, rivers and seas are habitation of deities²⁴. Thus, everybody has to keep off the stream since nobody wants to die. The significance of this is that the stream would be left alone for as long as the custodians of the deity deems it fit, essentially to enable sea food like fish, shrimps, prawn, and so on, attain maturity before harvesting it. It is like leaving a farmland fallow for the soil to recover and regain its lost nutrients before planting it again. When the time comes, the oracle through its custodians will announce the safety of the streams so that the people would go and continue their normal fishing activities. Without such restrictions, some species of the sea animals may go into extinction as a result of incessant fishing.

Another superstition is that of the sacred (royal) python. The researchers are of the view that the python has to enjoy great level of protection in Igboland because of its importance in the ecosystem. The python are also among the endangered species compared to other species of snakes. The idea stems from the contention among many people that animals are not part of the environment an argument that does not hold sway in any logical discussion. Thus, when we talk about protection, animals are a key factor. For animals, it is more about conservation. It has to do with protecting the endangered species from extinction by discouraging activities such as poaching, killing, and selling them among others.

In other to effect the protection, it is a given that, anybody who kills the sacred python by accident would give it an elaborate funeral that is befitting for a human being. But more danger befalls anybody who kills it willfully. On this, one of the missionaries in Umuaro, Mr. Goodcountry either ignorant of the dangers of environmental degradation or being consumed by religious overzealousness, charges the innocent young converts that, "the test of being a good Christian is to kill the sacred python". To which Mr. Moses Unachukwu explains to them the dangers through the myth spun around it that: One day, six brothers from Umuama village conspired and killed the sacred python. They cooked

²⁴ Catherine Acholonu-Olumba, *They lived Before Adam: Prehistoric Origins of the Igbo, The Never Been Ruled*. Owerri: Fylann Ltd., (2009).

yam pottage with it. As they were filling their plates with the stew, quarrel broke out among them. It became so fierce that the entire six villages of Umuama were nearly wiped out. The remaining people fled to distant lands and later went to a seer who told them that Idemili deity was punishing them for killing its python. From that day, they decreed that anyone who kills a python would be regarded as having killed his kinsman.

This story is well known by the entire community of Umuaro and it has not been questioned before, but, Mr. Goodcountry dismisses it as a story that is not fit to be heard in the house of God. It was this defiance that gave Oduche the impetus to attempt suffocating the sacred python. Mr. Goodcountry had also earlier told them about other Christians who suffered martyrdom in Bonny and charged them thus:

If we are Christians, we must be ready to die for the faith", you must be ready to kill the python as the rivers killed the Iguama; if you are afraid to kill it, do not count yourself as a Christian"²⁵.

The story empowers Oduche to attempt to 'murder' a sacred python by suffocating it in a box. This action by Oduche which is considered as an act of sacrilege rekindled the ancient hostility between Ezeulu and the priest of Idemili despite the fact that Ezeulu had earlier resolved to put things right with his personal god during the forthcoming Festival of the new pumpkin leaves and to cleanse the entire people of Umuaro of all their sins before the planting season.

The action of Mr. Goodcountry has actually encouraged the violation of other cultural practices. In another part of the diocese, 'an energetic young convert led other Christians to burn down a shrine and also kill a sacred' python'. These cultural violations and hostilities made Mr. Moses Unachukwu to write a petition on behalf of the priest of Idemili to the Bishop against Mr. Goodcountry. It should be noted that on the order of the church, a portion of land was cleared and a church built in Umuaro and this led to further degradation of the environment. It was reasoned that by clearing the forest reserve (evil forest) for the building of the church, part of the environment was converted. Note again that it is called 'evil forest with a view to always evoke fear in order to make it safe for the

²⁵ ---*Arrow of God*. p. 46-47.

habitats inside the forest and to prevent the people from illegal hunting, poaching, mining and farming. It should be observed again that the Igbo religion does not require a building for worship. The Igbo worship venues are usually a small shrine in the forest or within the compound. This is probably because 'God does not live in a house built by man'²⁶. In a memorandum to the colonial administration by the lieutenant Governor in *Arrow of God*, it was noted that

“...while we endeavor to purge the native system of its abuses to build a higher civilization upon the soundly rooted native stock that had its foundation in the hearts and minds establishing it into lines consonant with modern ideas and the spirit of the people instead of killing all that and trying to start afresh. We must not destroy the African atmosphere, the African mind, the whole foundation of his race...”²⁷.

We can deduce from the above, that the colonial administration did not want to admit openly that Africa (the Igbo) has any good civilization, but they surreptitiously wants to uphold and build on it according to the memorandum, and almost ended up doing just the opposite. Here, we return to Frazer's "Sympathetic magic" earlier referred to justify this claim and the principle of butterfly effect and chaos theory.

The Early Man and His Environment

As far back as history can remember, man was known to be making discoveries and affecting changes that would make him live comfortably in his God-given environment. He discovered, for instance that there is greater power beyond his own as he experienced occasionally, some natural occurrences like thunderstorms, earthquakes, land-slides, lightening, volcanic eruptions, oil spillages, ocean waves, tornado and the revolution of the sun and moon among others. Some of these natural occurrences are disastrous while some are not. Man sought for ways to control, manipulate and convert these natural phenomena to his

²⁶ The Good News Bible. Acts 7:48 & 17:24. Today's English Version, 5th ed., New York: Swapna Printing Works, 2005.

²⁷ --- *Arrow of God*. p. 56.

advantage. Although Frazer, as cited in Omeje²⁸, claimed that the above experiences took place in Greece, but the experiences gathered from *Arrow of God* is indicative that Fraser's account may have emanated from Africa (Igboland).

Recognition of these natural occurrences of their world gave the prehistoric Igbo, the insight, power, and wisdom to understanding the complex, chaotic dynamics of the atmosphere and their quest to control it led to the practice of "Sympathetic magic". Through this practice, the Igbo could observe the seasons, understand the weather and offer and make the necessary rituals and sacrifices. With knowledge and understanding that our ecosystems, social systems, political system and our economic systems are interconnected and interrelated, the idea of environmental protection was birthed. Part of this is evidenced in Ezeulu's roasting and eating of the sacred yams, one every month. By so doing, he reckons that the last yam in the stock usually marks the new yam harvest. It is observed that without the rituals that usher in the eating of the new yam, anybody dares harvest the yams. The effect of thwarting this order in *Arrow of God* turned out very disastrous as can be observed from what befell Ezeulu and some of his family members when he deliberately refused to announce the arrival of the new moon on the pretext that he is still waiting for the god (Ulu) to direct him on what to do.

Modern (scientific) man took a cue from these natural phenomena from where he wrestled from his prehistoric counterpart the knowledge. Thus, from there, he developed modern equipment to enable him enhance the observation, using the mathematical term "fractal", (fractal mathematics) to describe the infinite complexity of nature or 'chaotic behaviour'²⁹. Thus, it is appropriate to say that some natural objects like landscapes, clouds, trees and rivers among others, exhibit fractal properties and many of the systems in which we live exhibit complex patterns.

Conservation of Biodiversity

Conservation of biodiversity is a study in methods to protect biodiversity. Biological diversity or biodiversity refers to the variety of life anywhere on earth. The different living organisms scattered everywhere

²⁸ Oguejiofor Omeje, "Feminism in Pre-Colonial Igboland: The Nsukka Example". *Ikenga Journal of Institute of African Studies*. University of Nigeria, Nsukka. Vol. 19. (1): 2019, 259-267.

²⁹ Jean-Francois Gouyet, "Physics and Fractal Structures". New York: Masson Springer, 1996.

on the face of the earth are what make up the biodiversity³⁰. These organisms (humans, animals, plants, insects and so on) live together and adapt to a certain type of relationship with other organisms in their communities. Whether it is parasitic or symbiotic relationship, it goes to show that life depends on life. That is, organisms depend on other organisms for survival. As part of their survival, humans need oxygen and plants need carbondioxide. With the increase in the world human population, land, water and air gets polluted or out-rightly destroyed on daily basis due largely to escalation of the need for food, shelter and natural resources for production and manufacturing, thereby leading to habitat (natural home for organisms') loss.

Apart from pesticides and other chemicals that pollute the soil, the greatest source of pollutants is burning of fossil fuels. The different dangerous gasses introduced into the atmosphere through this process causes great harm to the ozone layer that helps to protect living organisms on earth's surface from receiving lethal doses of ultraviolet radiation³¹. Realizing the possible extinction of some species of organism due to the above activities, there is a need for the rekindling of the strategies of conservation of biodiversity. The researchers are of the view that referring back to the same old almost abandoned Igbo ideology addressed through religion, superstitions, myth and other cultural practices as conveyed in *Arrow of God* but in contemporary times has come to be labeled as Ecoliteracy, Ecolinguistics and Eco criticism among others will go a long way in creating channels for sustainability and environmental growth.

Conclusion

The discussion has been an interrogation of eco-literacy in Achebe's *Arrow of God* (with reference to Shakespeare's *Julius Caesar*) and an affirmation that long before the campaign for environmental protection became a global trend, Igbo societies have made significant in road towards saving the biosphere from any possible harm due to the various human activities through traditional religion, superstitions, and other various socio-cultural practices. Those attempts may be insubstantial, but the Butterfly Theory has proven that small changes in the initial conditions often lead to drastic changes in results obtainable on the long run. Nothing

³⁰ Alton Biggs; Kathleen Gregg; Whitney Crispen Hagins and others. (Eds.) *Glencoe Biology: The Dynamics of Life*. Columbus: McGraw-Hill, 2002.

³¹ Ibidem.

can be truer than this assertion when compared to such paltry Igbo contributions to environmental protection. The contribution is meager, but whether or not it continued over the years, the result cannot be determined because of the systems' unpredictability which is one of the principles of Chaos Theory.

If the Igbo perceives of any endangered species of organisms, a protection myth or superstition is immediately coined around it and disseminated round the entire community with a view to protect it from going into extinction. What makes this methodology effective and acceptable is that the gods or deities are involved in punishing any violator. The punishment could be a fine, refusal to take a title, ostracism, banishment, death or a dreadful sickness like 'swollen stomach or scrotum which anyone who dies of it is not given a befitting burial but thrown into the evil forest and no Igbo person would like to be subjected to any of these public ridicule. On another level, if cars, for instance are the major air pollutants, Igbo cosmology would have found suitable superstition or myth to minimize the number of cars on the roads or to warn people of the danger of driving cars that are faulty. Like the 'Okposelebo'(a myth in Igboland that there is a particular type of palm wine that if anybody drinks it, it is capable of causing someone to sleep all through the day without waking up and it is also capable of tearing a whole clan apart) and the 'python killing' in *Arrow of God*, one can believe that after the incident

Some of these cultural practices are still in effect in Igboland today and the results are impressive. The researchers conclude that the early colonizers may be ignorant of Eco literacy or they would have probably helped the Igbo to shape and strengthen the ideology behind it instead of starting afresh as the Lieutenant Governor feared in his Memorandum to his subjects. In light of the above, the researchers recommend that given the rate and manner at which our environment are being degraded on a daily basis, there is therefore an urgent need to revisit some of those cultural practices which held sway in Igboland in the early times with a view to find more natural ways of sustaining our environment in the contemporary times.

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PERSONAL SECURITY AND FREEDOM OF MOVEMENT OF CITIZENS: CHALLENGES IN THE CONTEXT OF THE GLOBAL PANDEMIC IN 2020

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Abstract: *This article analyzes the impact of the global COVID-19 pandemic, which hit the world in early 2020, on the fundamental right to freedom of movement in the EU and Ukraine. The issues of personal security of the population and ensuring their rights in the conditions of restrictions imposed by countries in these conditions are considered in detail. The authors examine whether the conditions of quarantine are not a restriction of the right to freedom of movement or even a deprivation of liberty.*

The purpose of this article is to clarify international standards of the right to freedom of movement, permissible restrictions on the right to freedom of movement in order to ensure personal and public safety in a pandemic COVID-19. The article has to become an interesting contribution to the debate about the restrictions imposed on the right to freedom of movement in the COVID-19 crisis. The review also aims to point out the white spaces or opportunities for further research on involvement of personal safety of citizens.

Keywords: *Pandemic; personal security; human rights; public safety; quarantine; freedom of movement.*

Introduction

In early 2020, the world faced unprecedented challenges for personal, social, national and international security. The rapid spread of the SARS-CoV-2 virus from China to European countries, as well as to all countries of the world, has changed the domestic and foreign policies of states. The

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EU countries and Ukraine began to feel this threat at the end of February 2020, and in March the borders were closed, as a result of which citizens of many countries were restricted in their freedom of movement in terms of both inside and abroad travel. One government after another is imposing new restrictive measures to reduce the spread of COVID-19 and save people. On March 11, 2020, the WHO declared a global pandemic, and as of November 2020, there were more than 46 million infected in the world. EU countries remain the epicenter of an outbreak and the situation with limited movement of people may change in the following months. In Ukraine, the situation is similar to neighboring European countries. However, as UN Secretary General Antonio Guterres noted on Twitter: "COVID-19 is a health crisis that is rapidly becoming a human rights crisis". Guterres added that people and their rights should be the focus¹. In support of this view, the website of the UN High Commissioner for Human Rights contains an appeal by Michelle Bachelet stating: "Emergency measures, which restrict the right to freedom of movement, should be proportionate to the risk, time-bound, and safe"². That is why the issue of human rights in the context of a global pandemic and quarantine measures needs attention.

The purpose of this article is to clarify international standards of the right to freedom of movement, permissible restrictions on the right to freedom of movement in order to ensure personal and public safety in a pandemic COVID-19. The article has to become an interesting contribution to the debate about the restrictions imposed on the right to freedom of movement in the COVID-19 crisis. The review also aims to point out the white spaces or opportunities for further research on involvement of personal safety of citizens.

The study is based on an interdisciplinary approach to the analysis of the problem of applying measures to combat the COVID-19 pandemic by different states and the admissibility of such measures to interfere with the right to freedom of movement through dialectical, comparative legal, systemic methods. Survey results and statistics were also used. Most of the publications are laws and international legal acts, ECtHR case law. The

¹ COVID-19 and Human Rights. We are all in this together, April 2020, United Nations. <https://cutt.ly/PuPRLyb>

² Michelle, Bachelet, *Letter High Commissioner for Human Rights*, 31 March 2020. <https://cutt.ly/luPGi9j>

primary focus of the review lies on academic, peer-reviewed articles, monographs, or proceedings by distinguished authors.

COVID-19 pandemic and personal safety of citizens

Whereas freedom of movement and personal security were previously more closely linked to certain external and internal threats to national security, a new aspect has emerged. This aspect has important role in the formation and implementation of public policy, identification of challenges to governance and security sector reform, determining the priorities of national policies in protecting the lives of citizens.

It is noteworthy that according to a 2017 survey, 82.3% of Ukrainians did not consider themselves protected from natural disasters, but 75.6% from epidemic diseases. In today's conditions, we can consider the COVID-19 pandemic an epidemic disease. The feeling of personal security of respondents is most affected by: the armed conflict in eastern Ukraine (40% of respondents), the economic situation (38.1%) and the criminogenic situation (34.1%). It is unfortunate that Ukrainians pay very little attention in their assessments (6%) to the observance of fundamental rights and freedoms as one of the key prerequisites for security and development. However, regional, age and gender differences are not statistically significant³.

With the spread of coronavirus, the issue of personal security has become relevant for all countries. It is worth mentioning that according to the results of the study conducted in Ukraine in 2017, the citizens of Ukraine feel most safe in a familiar environment (their own apartment, house and yard, in their area). In most cases, men claim a higher level of security than women. There is also a clear tendency for the level of security to decrease with the age of the respondents. The feeling of security is greatly influenced by two main factors: the assessment of the relevance of each of the threats to their own security and the level of expectations of the citizen regarding the reliability of protection by the State⁴. Although the study was conducted several years before the pandemic, it confirms that the personal safety of citizens is best ensured in the isolation of the home. And it is such measures that most countries now rely on. This is confirmed by the results of our survey of experts in

³ Citizens of Ukraine on security: personal, national and its components, 2017, Kiev (Ukraine), (in Ukrainian). <https://cutt.ly/vuPR5a8>

⁴ Ibid.

Ukraine, where the three key factors in the sense of personal safety of citizens in quarantine include the availability of remote work, permanent income and staying at home.

The right to freedom of movement as the basis of personal freedom

Freedom of movement of the person is a universally recognized right, guaranteed at the level of both international acts and national legislation of European states and Ukraine. Freedom of movement at the international level was first enshrined in the Universal Declaration of Human Rights (Article 13), and subsequently also in the International Covenant on Civil and Political Rights (Article 12).

It was in the Universal Declaration of Human Rights that the substantive elements of freedom of movement were formed, in particular: the right to move and choose one's place of residence freely, as well as the right to leave any country, including the state of which he or she is a national and return to this country. The International Covenant on Civil and Political Rights has already supplemented this right with a guarantee that no one may be arbitrarily deprived of the right to enter the State of which he is a national. That is why, even in a pandemic, depriving a person of the right to return to the State of which he or she is a national would be a gross violation of Article 12 of the International Covenant on Civil and Political Rights.

The origin of the right to free movement can be traced in the ancient concept of recognizing free movement as a basic element of personal freedom. There is still a debate among scholars about the concept and content of freedom of movement. Adam Hosein proposes to distinguish between "freedom of movement" and "freedom of international mobility"⁵. The scholar also concludes that freedom of movement does not apply to individual autonomy, but rather to democracy and political equality, and the scholar does not support the idea of open borders in modern conditions⁶. Although the study was published by the author in 2013, there is a very limited chance to start discussions about removal of borders in the nearest future, but on the contrary, restrictions on interstate

⁵ Adam, Hosein, Immigration and freedom of movement, *Ethics & Global Politics*, Vol. 6, 2013, № 1, p. 25-26. <https://www.tandfonline.com/doi/pdf/10.3402/egp.v6i1.18188>

⁶ *Ibid*, pp. 35-36.

movement and increased border controls seem quite realistic due to the threat of continuation of the COVID-19 pandemic or its recurrence.

Ukrainian scholars justify the narrow and broad meaning of the term "freedom of movement". In a broad sense, freedom of movement includes: the right of a citizen to move freely within the State; the right to choose the place of residence; the right to leave the country freely; the right to return to one's country without obstacles⁷. The narrowed concept of freedom of movement is reduced only to the free mobility of a person who is legally in the State within its territory⁸. Article 3 of the Law of Ukraine "On Freedom of Movement and Free Choice of Residence in Ukraine" enshrines the narrowest understanding of freedom of movement only within the State⁹. Council Directive 2004/38/EC of 29 April 2004 on freedom of movement also includes the right to leave the country freely¹⁰.

In our opinion, the approach of Mykolayenko Y.I. is correct, as he suggested that: "the right to freedom of movement means a guaranteed and regulated at the national and international legal levels possibility of a person within its legal status and on legal basis to move freely and without any obstacles within the territory of Ukraine, to leave the territory of Ukraine freely and return to Ukraine"¹¹.

At the same time, for some reason, the freedom of movement is limited to the territory of Ukraine, which does not give a definition of a universal nature. In the already mentioned our own study, half (20 people) of researchers indicate that the closure of borders can be considered a restriction of personal human rights, 11 believe that it is not

⁷ Olena Kokhanovs'ka, Problems of realization of the right to freedom of movement in Ukraine and the practice of the European Court, *Chasopys tsyvilistyky*, (in Ukrainian), No. 18, 2015, p. 158.

⁸ M.O. Lyubchenko, Constitutional and legal regulation of the right to freedom of movement in Ukraine, *Sudova apelyatsiya*, (in Ukrainian), No. 3(40), 2015, pp. 66-67.

⁹ On freedom of movement and free choice of residence in Ukraine: Law of Ukraine, 11.12.2003, No. 1382-IV, (in Ukrainian). <https://zakon.rada.gov.ua/laws/show/1382-15>

¹⁰ Directive 2004/38/EC of the European Parliament and of the Council of 29 April 2004 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States amending Regulation (EEC) No 1612/68 and repealing Directives 64/221/EEC, 68/360/EEC, 72/194/EEC, 73/148/EEC, 75/34/EEC, 75/35/EEC, 90/364/EEC, 90/365/EEC and 93/96/EEC. <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX:32004L0038>

¹¹ Yuriy Mykolayenko, *Theoretical and legal principles of implementation of the right human being to freedom of movement and free choice of residence in Ukraine*, Kiev (Ukraine), (in Ukrainian), 2019, p. 12.

"a restriction" and 9 people consider it a partial restriction of rights. At the same time, the question "Can quarantine measures in countries be considered a restriction of personal human rights?" the answers are somewhat different. Affirmative answer was given by 17 people, which is 42.5%, negative – 13 (32.5%) and 10 people consider such measures be a partial restrictions. Thus, most scholars believe that the closure of borders has more impact on the restriction of personal rights than restrictions in internal travels within the country.

The right to leave the country is not absolute and cannot be equal to the right to permanent migration, but it must allow movement on a temporary basis and ensure the exercise of other rights¹². Freedom of movement within the country is not absolute either. It is Article 12, paragraph 3, of the International Covenant on Civil and Political Rights that contains the criteria for the admissibility of restrictions on freedom of movement, in particular those provided for by law and necessary to protect public safety or public health.

Convention for the Protection of Human Rights and Fundamental Freedoms¹³ does not contain the right to freedom of movement, it is enshrined in Article 2 of Protocol 4¹⁴ and corresponds in content to the provisions of other international instruments, the only one on restrictions, then Part 3 also adds that they must be necessary in a democratic society, and Part 4 allows restrictions in certain areas. Article 45 of the Charter of Fundamental Rights of the European Union states that every citizen of the EU has the right to move freely within the territory of the Member States and that this right may be granted to third-country nationals legally residing on the territory of any Member State¹⁵.

In its General Comment No. 27 the HRC has provided an authoritative interpretation: "liberty of movement is an indispensable condition for the free development of a person. ... Freedom to leave the

¹² Jane Mcadam, *An Intellectual History of Freedom of Movement in International Law: the Right to Leave as a Personal Liberty*, *Melbourne Journal of International Law*, Vol 12, 2011, p. 29. <https://cutt.ly/nuPIfXe>

¹³ Convention for the Protection of Human Rights and Fundamental Freedoms, 04.11.1950, (in Ukrainian). https://zakon.rada.gov.ua/laws/show/995_004

¹⁴ Protocol No. 4 to the Convention for the Protection of Human Rights and Fundamental Freedoms, which guarantees certain rights and freedoms not provided for in the Convention and in the First Protocol thereto of 16 September 1963, (in Ukrainian). https://zakon.rada.gov.ua/laws/show/994_059

¹⁵ Charter of Fundamental Rights of the European Union, (in Ukrainian). https://zakon.rada.gov.ua/laws/show/994_524

territory of a State may not be made dependent on any specific purpose or on the period of time the individual chooses to stay outside the country. Thus travelling abroad is covered as well as departure for permanent emigration. Likewise, the right of the individual to determine the State of destination is part of the legal guarantee¹⁶.

In our opinion, the right to freedom of movement and the right to free choice of residence are separate rights. Freedom of movement is a fundamental right that derives from human dignity and is an element of the general concept of individual freedom, and enshrining this right at the level of international instruments has become only an additional guarantee for its implementation and limiting state arbitrariness to interfere in this right. Freedom of movement implies the right of a person to move freely both within the state of which such a person is a citizen or resides in it on legal grounds, and to leave the borders of the State and return to its territory.

Grounds for restricting the right to freedom of movement in the context of the COVID-19 pandemic

Given that many countries have closed their borders under quarantine conditions, migration policy and the living conditions in which migrants find themselves deserve special attention. Migration policy can affect the exercise of almost all human rights guaranteed by international instruments, but has a direct regulatory effect on a person's freedom of movement.

There is no doubt that in conditions of threat to both the personal safety of citizens and public safety due to the risk of infection with COVID-19, the State may rely on various measures that restrict the rights of individuals. In this part we will consider the legitimacy and admissibility of restrictions on freedom of movement, the regulation of which is the basis of migration policy.

Restrictions on freedom of movement within the EU are permissible under Articles 27 and 29 of Directive 2004/38/EC in the case of "diseases with epidemic potential", but measures taken on grounds of public security "must comply with the principle of proportionality"¹⁷. The

¹⁶ Human Rights Committee, General Comment N 27: Freedom of movement (article 12), CCPR/C/21/Rev.1/Add.9, 1 November 1999, para 1, 8, hereinafter HRC, General Comment No. 27.

¹⁷ Directive 2004/38/EC of the European Parliament and of the Council of 29 April 2004 on the right of citizens of the Union and their family members to move and reside

European Commission has stated that such measures should not discriminate against EU citizens, should not prohibit the entry of an EU citizen or a third-country national residing on the territory of an EU Member State, should facilitate the transit of other EU citizens and returning residents to home. At the same time, there exist a number of problems in practice. For example, in Hungary, as of March 17, 2020, only Hungarian citizens or persons with a permanent residence permit were allowed to enter the country. To solve the problem of impossibility for a person with a Schengen visa of an EU Member State to leave due to the closure of borders, the term of such a visa may be extended or a national visa, a temporary residence permit¹⁸.

In the context of the pandemic, the European Commission has published for all EU citizens the COVID-19 Guide on the implementation of temporary restrictions on non-essential travel to the EU, on simplifying the transit regime for repatriation of EU citizens and on the impact on visa policy and ensuring the availability of goods and basic services, the Commission Notice on temporary restrictions on non-essential travel to the European Union, and COVID-19; Temporary restriction on non-essential travel to the EU. In particular, one of these documents states the following: while travel restrictions are generally not seen by the World Health Organisation as the most effective way of countering a pandemic, the rapid spread of COVID-19 makes it essential that the EU and Member States take urgent, immediate and concerted action not only to protect the public health of our population, but also to prevent the virus from further spreading from the EU to other countries, as it has been observed in recent weeks. Travel restrictions should focus on drastically reducing incoming people flows at the external borders of the Union, thereby also slowing transmission to other countries on travellers' return, and discouraging outgoing travel of EU citizens and other persons residing in the EU+ area. The EU's external border has to act as a security perimeter for all Schengen States¹⁹.

freely within the territory of the Member States amending Regulation (EEC) No 1612/68 and repealing Directives 64/221/EEC, 68/360/EEC, 72/194/EEC, 73/148/EEC, 75/34/EEC, 75/35/EEC, 90/364/EEC, 90/365/EEC and 93/96/EEC. <https://cutt.ly/yg2aGK6>

¹⁸ Coronavirus Pandemic in the EU – Fundamental Rights Implications, Bulletin No. 1, Non-discrimination Racism Fundamental Rights EU Charter of Violence against women, 20 MARCH 2020, Luxembourg: Publications Office of the European Union, 2020. <https://cutt.ly/CuPbrBK>

¹⁹ Communication from the Commission COVID-19: Temporary Restriction on Non-Essential Travel to the EU, 16.03.2020. <https://cutt.ly/XuPILpO>

In Ukraine, freedom of movement is guaranteed primarily by Article 33 of the Constitution of Ukraine. From the analysis of this norm, it can be concluded that freedom of movement does not depend on citizenship, sufficient legal grounds for a person to stay in Ukraine is enough, and it includes the right to leave Ukraine freely, except for restrictions to be established by law. Moreover, citizens of Ukraine cannot be deprived of the right to return to Ukraine at any time. With this in mind, the decisions to close Ukraine's borders concern only the entry of foreigners into Ukraine, and in no way concern the return of citizens to Ukraine. At the same time, in order to prevent infection spread in duly justified cases such citizens may be obliged to a certain period of self-isolation or even observation, which will be legitimate restrictions on freedom of movement in view of the Law of Ukraine "On Protection of Infectious Diseases"²⁰.

The situation of emergency (not the state of emergency) was introduced in Ukraine on March 25, 2020²¹. The issue of the situation of emergency is not regulated at the constitutional level, unlike the state of emergency and according to Article 64 of the Constitution of Ukraine even in a state of emergency a number of rights cannot be restricted, while Article 33 establishing freedom of movement may be limited. According to the Civil Protection Code of Ukraine, in the event of an emergency situation, citizens must comply with the anti-epidemic regime, which also allows for quarantine and restriction of traffic. That is, in an emergency situation, the regime imposed may in fact restrict the exercise of a number of human rights, and if there are legitimate grounds for the competent authority to take a decision providing for statutory measures, such interventions will meet the rule of law as required by the Convention on the Protection of Human Rights and fundamental freedoms and the practice of the ECtHR.

In general, the restriction of the right to freedom of movement will be lawful and permissible if it is justified by legal rules, is necessary in a democratic society and for a legitimate purpose.

With regard to Ukraine, in general, the quarantine procedure on March 11, 2020 was legitimate, introduced in accordance with Article 29 of

²⁰ On protection of the population from infectious diseases: Law of Ukraine, 06.04.2000, № 1645-III, (in Ukrainian). <https://zakon.rada.gov.ua/laws/show/1645-14>

²¹ Order of the Cabinet of Ministers of March 25, 2020 № 338-r. "On the transfer of a single state system of civil protection in an emergency situation", 25 bereznya 2020 r, № 338-r, (in Ukrainian). <https://cutt.ly/UuPbdV0>

the Law of Ukraine "On Protection of the Population from Infectious Diseases"²² by the competent authority – the Government²³.

As of June 2020, ten States have made a declaration of withdrawal from their obligations under the Convention for the Protection of Human Rights and Fundamental Freedoms under Article 15: Latvia (16 March), Romania (18 March), Armenia (20 March), Estonia (20 March), Moldova (20 March), Georgia (23 March), Albania (1 April), Macedonia (2 April), Serbia (7 April) and San Marino (14 April)²⁴. Ukraine has not yet made such a statement. States, which have derogated on the basis of Article 15 of the Convention for the Protection of Human Rights and Fundamental Freedoms must inform the Secretary General of the Council of Europe of the measures taken. At the same time, it is necessary that the restrictions on rights introduced be proportionate, despite the allegations of derogation. In the case of "Mehmet Hasan Altan v. Turkey" the ECtHR argued that a declaration of derogation did not imply the possibility of imposing measures without legal grounds and without respecting the constitutional guarantees established in the State (paragraph 140)²⁵.

The Council of Europe in "Respecting democracy, rule of law and human rights in the framework of the COVID-19 sanitary crisis" noted: "Respecting democracy, rule of law and human rights in the framework of the COVID-19 sanitary crisis A derogation under Article 15 is not contingent on the formal adoption of the state of emergency or any similar regime at the national level. At the same time, any derogation must have a clear basis in domestic law in order to protect against arbitrariness and must be strictly necessary to fighting against the public emergency. States must bear in mind that any measures taken should seek to protect the democratic order from the threats to it, and every effort should be made to safeguard the values of a democratic society, such as pluralism, tolerance and broadmindedness. While derogations have been accepted by the

²² On protection of the population from infectious diseases: Law of Ukraine, 06.04.2000, № 1645-III, (in Ukrainian). <https://zakon.rada.gov.ua/laws/show/1645-14>

²³ Resolution of the Cabinet of Ministers of March 11, 2020 № 211 "On prevention of the spread of coronavirus COVID-19 in Ukraine", № 211, (in Ukrainian).

<https://cutt.ly/HuPxb4>

²⁴ Convention for the Protection of Human Rights and Fundamental Freedoms (ETS No. 5), Notifications under Article 15 of the Convention.

<https://www.coe.int/en/web/conventions/full-list/-/conventions/webContent/62111354>

²⁵ Case of Mehmet Hasan Altan v. Turkey, Application No. 13237/17, 20, March 2018. <https://hudoc.echr.coe.int/eng#%7B%22itemid%22%3A%22001-181862%22%7D>

Court to justify some exceptions to the Convention standards, they can never justify any action that goes against the paramount Convention requirements of lawfulness and proportionality"²⁶.

Given the domestic situation and measures to combat the pandemic, the governments of a number of States have already withdrawn their derogations and the provisions of the Convention for the Protection of Human Rights and Fundamental Freedoms are fully operational again. The following countries have withdrawn the derogation: Albania (25 June 2020), Armenia (16 September 2020), Estonia (18 May 2020), Latvia (10 June 2020), Romania (15 May 2020), North Macedonia (30 June 2020), San Marino (8 July 2020) i Serbia (13 October 2020). Georgia retains the already notified derogations from certain obligations under Articles 5, 6, 8, 11 of the Convention, Articles 1 and 2 of Protocol 1 to the Convention, Article 2 of Protocol 4 to the Convention until 1 January 2021²⁷.

The revocation of the derogations by the States is extremely positive, as it confirms the State's understanding of compliance with the Convention's obligations to protect fundamental human rights, especially in emergency situations.

In the case of "A. and Others v. the United Kingdom" The European Court of Human Rights has analyzed the following issues: "Whether there had been a "public emergency threatening the life of the nation?". ECtHR noted that: "While it was striking that the United Kingdom had been the only Convention State to have lodged a derogation in response to the danger from al'Qaeda, the Court accepted that it had been for each Government, as the guardian of their own people's safety, to make its own assessment on the basis of the facts known to it. Weight had, therefore, to be attached to the judgment of the United Kingdom's Government and Parliament, as well as the views of the national courts, who had been better placed to assess the evidence relating to the existence of an emergency. ... The Court considered that the House of Lords had been correct in holding that the extended powers of detention were not to be seen as immigration measures, where a distinction between nationals and non-nationals would be legitimate, but instead as concerned with national

²⁶ Respecting democracy, rule of law and human rights in the framework of the COVID-19 sanitary crisis, A toolkit for member states, 7 April 2020. <https://cutt.ly/Ig2aIMI>

²⁷ Notification - JJ9086C Tr./005-265 - 16 July 2020 - Communication related to the Convention for the Protection of Human Rights and Fundamental Freedoms (ETS No. 5). <https://rm.coe.int/16809efedd>

security. ... In conclusion, therefore, the Court, like the House of Lords, found that the derogating measures had been disproportionate in that they had discriminated unjustifiably between nationals and non-nationals. It followed that there had been a violation of Article 5 § 1 in respect of all but the Moroccan and French applicants²⁸.

Therefore it is necessary to have a legitimate goal, in this case – the protection of national security against the threat of terrorism, in the case of the COVID-19 pandemic – the protection of national security against the threat to the health of the nation.

As of June 1, 2020, according to the WHO, 6,057,853 people were infected and 371,166 died. As of November 1, 2020, the number of infected people was 45,968,799, and 1,192,911 people died. Given the need to ensure not only personal but also public safety due to the threat of infection of the population with a new type of coronavirus infection, the need to protect health, the introduction of measures restricting the freedom of movement of the person was performed for legitimate purposes.

The need to restrict the right to freedom of movement to ensure public and personal safety

Further we intend find out whether the implemented measures are necessary in a democratic society. To do this, it is necessary to analyze the data on the extent to which the implemented measures have affected the level of infection of the population and the prevention of the spread of the virus.

Following the WHO declaration of the SARS-CoV-2 virus pandemic on 11 March 2020, the EU and Ukraine have taken various measures to prevent the spread of infection and ensure public and personal safety, including: mandatory observation (most countries); application of liability for violation of quarantine rules (usually administrative, but criminal liability is also possible); closure of educational and entertainment facilities, as well as public catering services (remote operation of educational establishments is allowed, as well as operation of public catering establishments with food delivery); introduction of wearing masks; prohibition of movement by groups of persons (for example, in Ukraine the maximum movement of a group of two adults is allowed,

²⁸ Grand Chamber judgment *A. and Others v. the United Kingdom*, 19, February 2009. <https://cutt.ly/Qg2aEw5>

without limiting the number of children they accompany); ban on visiting parks and recreation areas; maximum transfer of employees to remote work; ban on most companies (introduced by Italy and Spain); closing borders; curfew (for example, in Italy, Spain and Georgia); self-isolation of persons belonging to risk groups. Ukraine has implemented all these measures, except for curfew and closure of all companies²⁹.

European Commission for Democracy Through Law (Venice Commission) notes: "...in a quarantine the focus is usually on keeping infected, or possibly infected, people in a small area; certain territorial areas or regions may be temporarily closed down. Covid-19 is a high threat to older people, and certain other risk groups, and the focus has partially shifted to keeping these non-infected people isolated from potentially infected people"³⁰.

Establishing of borders between states and restricting migration is an important element of political self-determination of the State³¹. To this argument we would also add the need to ensure national security. Following the enlargement of the Schengen area, the EU has focused on protecting its external borders, including preventing illegal migration and fighting against terrorism³². Within the Schengen area, the restoration of internal borders in the event of an emergency is also allowed.

Many of the restrictions specified above are called the "hard model", as opposed to the "soft model" (or liberal), which closes only schools, isolates patients and restricts the movement of people at risk (for example, in South Korea³³), or recommend social distancing, isolation of patients and do not close educational institutions (Belarus³⁴ and Sweden³⁵).

²⁹ Quarantine measures, Cabinet of Ministers of Ukraine, (in Ukrainian). <https://covid19.gov.ua/karantynni-zakhody>

³⁰ Respect For Democracy, Human Rights And The Rule Of Law During States Of Emergency –Reflections, European Commission for Democracy Through Law (Venice Commission), 26 May 2020. <https://cutt.ly/eg2anOZ>

³¹ Adam Hosein, Immigration and freedom of movement, *Ethics & Global Politics*, Vol. 6, 2013, № 1, p. 25-26. <https://www.tandfonline.com/doi/pdf/10.3402/egp.v6i1.18188>

³² Freedom of movement and the Schengen, Icelandic human rights centre. <https://cutt.ly/JuPxQq5>

³³ Dennis Normile, Coronavirus cases have dropped sharply in South Korea. What's the secret to its success? <https://cutt.ly/euPx3VG>

³⁴ Minsk surrendered to the coronavirus and imposed broad restrictions, (in Ukrainian). <https://cutt.ly/RuPcytK>

Both models restrict the right to freedom of movement. But while the "hard model" restricts freedom of movement more seriously, the liberal ("soft") model only slightly interferes with the right to free movement. The question arises as to the legitimacy of such restrictions.

State of infection in some countries³⁶:

Country	The total number of infected / Percentage of the infected to the total population (1.04. 2020)	The total number of infected / Percentage of the infected to the total population (01.06 2020)	Total died / The percentage of deaths from the total number of infected (01.06 2020)	The total number of infected / Percentage of the infected to the total population (01.11 2020)	Total died / The percentage of deaths from the total number of infected (01.11. 2020)	Total population
USA	163 199/ 0,05%	1 734 040/ 0,52%	102 640/ 5, 91%	8 952 086/ 2,7%	228 185/ 2,54%	330 627 484
Spain	94 417/0,2%	239 801/ 0,51%	29 045/ 12,11%	1 185 678/ 2,53%	35 878/ 3,02%	46 754 778
Italy	105 792/0,17 %	233 019/ 0,38%	33 415/ 14,34%	679 430/ 1,12%	38 618/ 5,68%	60 461 826
France	51477/0,07%	148 524/ 0,22%	28 746/ 19,35%	1 331 808/ 2,07%	36 473/ 2,73%	65 273 511
Germany	67 366/ 0,08%	181 815/ 0,21%	8 511/ 4,68%	532 930/ 0,63%	10 481/ 1,96%	83 783 942
The United Kingdom	25 154/ 0,03%	274766/ 0,4%	38 489/ 14,0%	1 011 664/ 1,49%	46 555/ 4,6%	67 886 011
Sweden	4435/ 0,04%	37542/ ,37%	4395/11,7%	124 355/1,23%	5 938/ 4,77%	10 099 265
Republic of Korea	9887/ 0,19%	11 503/ ,02%	271/ 2,35%	26 635/ 0,05%	466/ 1,75%	51 260 707
Poland	2311/ 0,006%	23 786/ 0,06%	1 064/ 4,47%	362 731/ 0,95%	5 631/ 1,55%	37 846 611
Romania	2245/ 0,012%	19 257/ 0,1%	1 262/ 6,55%	241 339/ 1,25%	6 968/ 2,88%	19 237 691
Czechia	3308/ 0,03%	9 273/ 0,08%	320/ 3,45%	335 102/ 3,12%	3 251/ 0,97%	10 708 981
Ukraine	669/ 0,001%	24 012/ 0,05%	718/ 2,99%	395 440/0,9%	7 306/ 1,84%	43 733 762
Belarus	152/ 0,001%	42 556/ ,44%	235/ 0,55%	99 459/1,05%	985/ 0,99%	9 465 300
Hungary	492/ 0,005%	3 876/ 0,04%	526/13,57 %	79 199/0,82%	1 819/ 2,29%	9 660 351
Slovakia	363/ 0,006%	1 522/ ,027%	28/ 1,83%	57 664/1,05%	219/0,38%	5 459 642

³⁵ Mikhail Sal'nikov, A pandemic without quarantine: how Sweden can withstand the coronavirus without tough restrictions, Yevropeys'ka pravda, (in Russian). <https://www.eurointegration.com.ua/rus/articles/2020/04/3/7108302/>

³⁶ Coronavirus disease 2019 (COVID-19), Situation Report - 72. <https://cutt.ly/NuPbZo6>; Coronavirus disease 2019 (COVID-19), Situation Report - 133. <https://cutt.ly/iuPb73D>; COVID-19 Weekly Epidemiological Update Data as received by WHO from national authorities, as of 1 November 2020, 10 am CEST. <https://cutt.ly/Wg2agb4>; European Countries by population, 2020. <https://cutt.ly/suPnul4>; United States Population. <https://cutt.ly/HuPnsS8>; South Korea Population. <https://cutt.ly/MuPnjBK>

That is why the indicator on the number of infections to the total population of Sweden is quite relevant, and as of June 1, 2020 it was 0.37%, it will be recalled that this country has set quite liberal restrictive measures. On the other hand, in the number of European countries with strict measures, this figure is higher (in Spain - 0.51%, Italy - 0.38%, Great Britain - 0.4%).

The countries of Eastern Europe have imposed rather strict measures, and as of June 1 have reached a fairly low level of infection in relation to the total population, in particular: in the Czech Republic - 0.08%, Romania - 0.1%, Poland - 0.06%, Hungary - 0.04% and Slovakia - 0.02%.

It is important to study statistics in dynamics. As of November 1, the rate of infection in the population has increased in all states and is in: USA - 2.7%, Spain - 2.53%, Italy - 1.12%, France - 2.07%, Germany - 0.63%, The United Kingdom - 1.49%, Sweden - 1.23%, Republic of Korea - 0.05%, Poland - 0.95%, Romania - 1.25%, Czechia - 3.12%, Ukraine - 0.9%, Belarus - 1.05%, Hungary - 0.82%, Slovakia - 1.05%. At the same time, compared to June 1, as of November 1, the mortality rate (to the number of infected) decreased significantly: in the USA from 5.91% to 2.54%, Spain - from 12.11% to 3.02%, Italy - from 14.34% to 5.68%, France from 19.35% to 2.73%, Germany from 4.68% to 1.96%, The United Kingdom from 14% to 4.6%, Sweden - from 11.7% to 4.77%, the Republic of Korea - from 2.35% to 1.75%, Poland - from 4.47% to 1.55%, Romania - from 6.55% to 2.88%, Czechia - from 3.45% to 0.97%, Ukraine - from 2.99% to 1.84%, Hungary - from 13.57% to 2.29%, Slovakia - from 1.83% to 0.38%.

These statistics are important because they can show the importance of measures taken to restrict freedom of movement to reduce the level of infection among the population in order to ensure personal and public safety. In addition, according to statistics, measures are being taken to liberalize quarantine restrictions on citizens of other countries. These data may be the subject of analysis in the European Court of Human Rights in case of appeal against the legality of measures to restrict freedom of movement and other rights. In our opinion, the increase in the number of infected in a pandemic is objective, this figure will continue to grow. The level of mortality reduction, which occurred both in the states that imposed severe restrictions (including border closures, curfews, which restricted freedom of movement), and in those states that did not.

Kanstantsin Dzekhtsyarov came to the right conclusion that the European Court of Human Rights has a limited set of tools to influence the current emergency situation, so other political bodies of the Council of

Europe can have better responding tools to it¹. At the same time, the Convention for the Protection of Human Rights and Fundamental Freedoms should not be underestimated, as the very prospect of carefully examining the actions of Council of Europe Member states in the event of potential appeals to the ECtHR is already a precautionary factor.

Moreover, scholars are already studying whether the restrictions imposed on stopping the spread of the coronavirus are merely an interference with freedom of movement or imprisonment. At the same time, they note that detention at home, even if conditions are much better there than in prison, can mean imprisonment, referring to the Judgment of the Grand Chamber in *Buzadji v. Moldova* dated July 5, 2016. It is also noted that it is necessary to take into account the possibility of leaving the house for shopping, sports, as well as deterrents, including large fines or imprisonment for violating quarantine requirements². Certainly, in the case of recourse to the ECtHR, all measures taken will be carefully analyzed, including their feasibility and effectiveness in order to prevent the spread of coronavirus. And it will be important to find a fair balance between the measures taken and the necessary restrictions on rights. In our opinion, the creation of conditions that lead to the impossibility to buy food, medicine, return to their own homes, own State can not be considered as proportionate.

Conclusion

Thus, the question of the proportionality of the measures taken by the State to counter the COVID-19 pandemic may be considered by the ECtHR regardless of whether the State has made a declaration of derogation and the recognition of the violation of the right to freedom of movement will depend on the country, scope and duration of the implemented measures, as well as their feasibility and effectiveness. In addition, measures imposed in the State that restrict freedom of movement may not be discriminatory (for example, against the Roma community, citizenship, social or economic status, political beliefs or any other feature).

From the point of view of the analysis of the case law of the ECtHR, it can be concluded that the long duration of measures restricting rights may

¹ Kanstantsin Dzehtsiarou, *What Can the European Court of Human Rights Do in the Time of Crisis? Strasbourg Observers*, April 14, 2020. <https://cutt.ly/UuPnLQF>

² Jeremy McBride, *Chambers, Monckton, An Analysis of Covid-19 Responses and ECHR Requirements*, 27 March 2020. <https://cutt.ly/8uPn0dg>

be the grounds for recognizing such measures disproportionate. Therefore, the position of a number of European states on the gradual lifting of restrictive measures is quite justified. Analyzed statistics, which show a reduction in mortality in all states and those that did not apply harsh measures, allow us to conclude that it is inexpedient to introduce harsh measures (closing borders, restricting movement within the state, curfew) to all persons without exception. Restrictions on the right to freedom of movement are possible only for persons who are ill and should be temporary (for the period of illness).

In our opinion, the prospects for further research may be new challenges to restrict the right to freedom of movement, including to ensure personal and public safety, as well as the feasibility and legality of controlling the movement of a person using the latest information and computer technology.

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FEATURES OF THE REFORMS OF UNITED MEDICAL AREA IN EU COUNTRIES AND UKRAINE

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Abstract: *This article analyzes the experience of European countries in creating a united medical space. The united medical space should be formed on the basis of human-centeredness, bioethics and be a key medical standard. States systematize health care legislation and implement and comply with international law.*

A united medical space must be formed on the basis of anthropocentrism. The united medical space should concentrate on the performance of public and private health care facilities to fully realize and ensure patients' rights to health care. The patient must be the goal of medical reform. Medical care provided to patients should be affordable and high quality, funded by public or private insurance companies. The only medical space in European countries is to facilitate the patient's access to a medical card, medicines, vaccines, quick access to medical care. However, as analyzed from the experience of Germany, Italy, Austria and France, the question of the priority of medical care remains open. Health care reform measures are assessed not only by short-term budget savings for the population, but also by their ability to promote health and generate health benefits for the entire population. It should be noted that with the help of telemedicine, artificial intelligence will improve and develop the field of health care, the quality of medical care, the attitude to medical workers.

Keywords: *united medical space, patient, medical worker, medical care, European Union.*

Introduction. The Ministry of Health of Ukraine is building a united medical space and equal opportunities for all patients. For the first time, Ukrainians have the opportunity to freely choose a doctor and no one should restrict their right. One of the key standards in the field of health care should be considered the principle of a united medical space, which requires equal access throughout the country to state-funded health care both by territorial criteria and by economic indicators, regardless of location, the financial status of the patient or his work. The purpose of the united medical space is to protect health by all permissible social regulators (legal, economic, ethical, religious, etc.) on the basis of self-

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reproduction (sustainable development) and a fair (equal for all) guaranteed level of medical care that reflects the realities and practical possibilities for improving the situation in the field of health care¹.

The first wave of major health care reforms since the introduction of compulsory health insurance in Imperial Germany was carried out by Otto von Bismarck in 1883 and in the United Kingdom by Winston Churchill and Lloyd George in 1911, as well as in Europe at the end of World War II.²

The main goal of the reforms was to ensure universal, equitable and free access to all health resources. Two models prevailed: (1) the gradual integration of existing medical resources into a national health service and free access for all, or (2) a social security system that would ultimately guarantee universal free coverage for services purchased from health professionals.

Efforts to limit the length of stay in short-term emergency hospitals have been accompanied by the promotion of primary care and the development of a variety of day care facilities, such as outpatient surgery, dialysis and radiation therapy. In a number of countries, the reduction in the number of beds in emergency care hospitals has been financially offset or rewarded by an increase in the number of beds in nursing homes and hospices and the development of community and elderly care programs, reversing the trend towards home care.

The pursuit of a full range of integrated services and the provision of economies of scale for more professional management systems are the main drivers of healthcare consortia in Europe, which developed later than in the United States. A number of governments use economic incentives to curb the existence of small and even medium-sized institutions³.

State responsibility for health policy decisions and resource allocation is being wiped out these days. Choices in health care and even increased incomes are gradually being demanded and redistributed far from traditional national centers of power. This "divergence in convergence" to the subnational levels and to the European levels is part of the formation of a new "Europe of the regions". There is a transfer of responsibility and authority to regional authorities⁴.

¹ R., Maidanik, p. 37 and 41, 2013, (in Ukrainian)

² Reinhard, Busse; Miriam, Blümel; Franz Knieps; Till, Bärnighausen, 2017, p. 886.

³ Ricarda, Milsteina; Carl, Rudolf Blankart, (2016), pp. 447-449.

⁴ Jan E. Blanpain, 1994.

Germany. Since 2012, the German health care system has undergone a period of active reforms in several areas. Two laws were passed, the first of which significantly expanded the support of people in need of long-term care and their families. The second law on strengthening long-term care (January 2016) will expand the right to long-term care services, which were previously provided only to people with significantly limited daily functions, it aims to ensure fairer provision of services by expanding compliance with people with physical, mental and psychological disabilities.

In Germany, there are two parallel health insurance systems: 1) public and 2) private health insurance, it is mandatory for all citizens and permanent residents of Germany.

1. State health insurance is managed by the German government. If a person is employed and his gross income is less than 59,400 euros per year, he is obliged to take state health insurance. The employer will charge 50% of these costs, but only up to 346.50 euros per month. And if the gross income exceeds 4425 euros, the person will pay from his pocket a monthly rate of 434.76 euros.

2. Private health insurance may be chosen by any employee with an estimated annual gross income of EUR 59,400. In some countries, private health insurance is more expensive than public insurance, but in Germany, private health insurance is often better priced, provides better service and more comprehensive coverage, such as the possibility of private / semi-private hospitals, glasses, contact lenses and other treatments which may not be available under public health insurance policies. Private patients typically receive preferred treatment during a visit to the dentist, doctor, or medical facility, with some physicians limiting their practice to private patients. As with public insurance, the employer will pay half the cost of private insurance. The share of employers is up to 379.45 euros for health insurance, as this is the maximum requirement if you remain on public health insurance⁵.

Public hospitals make up about half of all beds, and private non-profit hospitals make up about a third. All hospitals have mostly paid doctors. Doctors in hospitals are usually not allowed to treat outpatient diseases, but exceptions are made if the necessary care cannot be provided by professionals working in the office. Hospitals may provide certain specialized services in an outpatient setting.

⁵ German Health Insurance for Employees.

Responsibility for the system is shared between the national and regional levels (Earth). Lands are responsible for organizing medical education, planning inpatient facilities, and financing capital investments in hospitals. The German health care system is formed by contracts between compulsory health insurance funds (hereinafter - SHI-statutory health insurance) and various health professionals. Treatment options covered by SHI medical services include preventive services, inpatient and outpatient care, medical services, mental health, dental care, optometry, physical therapy, prescription drugs, medical supplies, rehabilitation, hospice and palliative care, pregnancy care, maternity leave and sick leave compensation. SHI prevention services include regular dental checkups, pediatric checkups, basic vaccinations, screening for chronic diseases, and screening for cancer at a certain age.

The patient is free to choose any doctor under contract. The number of doctors in Germany has been growing steadily over the last decade, from 337 doctors per 100,000 inhabitants in 2003 to 402 in 2013. The EU has an average of 344 doctors per 100,000 inhabitants. General and government expenditure on outpatient care as a percentage of current health care expenditure is the EU average (around 23%). Germany has the highest per capita hospital beds for medical care in the EU: 529 beds per 100,000 Germans, compared to 356 in the EU. Obviously, access to inpatient care is high⁶.

It is necessary to focus on expensive high-tech treatment, reduction of (cheaper) outpatient care but at the same level of service quality.

Doctors and other health care workers who work in hospitals or nursing homes or in rehabilitation are paid. Public and non-commercial providers typically pay public service tariffs to their employees, although private ones, in order to make a profit, providers may pay lower or higher wages or additional payments to their employees. Outpatient services are also provided by outpatient clinics to private physicians, dentists, pharmacists, obstetricians and other healthcare professionals who are subject to pre-determined pricing schemes or price ranges. Doctors may charge higher fees for private patients⁷.

16 states determine the capacity of the hospital, while the capacity of outpatient care is subject to the rules established by the Federal Joint Committee. Inpatient care is paid for admission through a system of

⁶ Germany Health Care & Long-Term Care Systems, 2016, pp. 98-99.

⁷ The same.

diagnostic-related groups that are reviewed annually, currently based on about 1,200 diagnostic categories. Diagnosis also covers all costs of the doctor⁸.

The vast majority of doctors and citizens in Germany are still positive about the health situation: 62 percent complain about long waiting times and 34 percent complain about the denial of cost-based services; - 63 percent of doctors criticize adherence to treatment schedules by patients. Acute situation in hospitals: 61 percent of hospital doctors complain about the lack of time for patients (in 2016 - 50 percent), 75 percent report that emergencies occur in emergency hospitals. Most physicians (59 percent) expect health care to deteriorate, and the general population is particularly concerned about the two-tier health care system and rising health insurance contributions.

On October 9, 2019, the Federal Statistical Office of Germany announced a new record for health care spending in Germany in 2018 - 387 billion euros. For the first time in the previous year, it exceeded 1 billion euros. Based on this, the public and doctors still perceive medical care in Germany as highly efficient. However, many complaints come about the long waiting time for medical services, which is associated with a difficult staffing situation and the need to deal with many "emergencies" during an emergency. Thus, there are problems that also need to be addressed immediately.

It should be noted that citizens are increasingly open to telemedicine, but only one in ten doctors actually offers video consultations or plans to do so. The general public is increasingly viewing telemedicine as a viable alternative to physically attending a meeting in practice (33 percent in 2019 and 22 percent in 2016). Indeed, more than half of those under the age of 30 would gladly accept such an offer. Healthcare workers also increasingly expect to see relevant proposals over the next ten years (89 percent), while far fewer Germans believe it will (48 percent). Doctors believe that telemedicine can solve the general shortage of doctors.

In Germany, a very small percentage of hospital physicians (4 percent) and even fewer resident physicians (2 percent) currently offer or plan to provide telemedicine services (86 percent and 88 percent, respectively). The main reasons for this are the expected impact on personal expenses (48 percent) and the increase in administrative expenses (74 percent). In

⁸ Miriam Blümel and Reinhard Busse. *The German Health Care System*.

addition, physicians are unsure whether there are adequate data protection measures for patients (63 percent).

It should be noted that no country, including Ukraine, can exist in pandemic Covid 19 without telemedicine⁹.

Austria. The Austrian reform experience underscores the importance of institutional factors for health care reforms in strengthening primary health care, especially in countries with a social insurance system. Ongoing reforms have strengthened the primary health care system, reducing the country's focus on health care. This could only be achieved because the new management system better aligned the objectives among the three main funding agents. An important aspect of the reform was the agreement on financial and medical goals among these three stakeholders. The share of day hospital procedures has increased in recent years, reducing the country's focus on inpatient care. However, the fragmentation of organizational and financial structures remains problematic. Further structural reforms are needed to overcome fragmentation and further divert services from the inpatient sector, while expanding outpatient care.

The country is expanding outpatient care. The current reforms have been an important foundation for building a strong primary health care system and reducing the country's concentration in the hospital. Ongoing health care reform also focuses on increasing public health spending. Average growth in health care expenditures, the health care sector has consistently exceeded GDP growth rates since 2012. In 2013, a general budget cap was introduced for federal, sectoral and regional health care budgets, which correlated with GDP growth, and what was further extended to the whole package of health care reforms in 2017. There are three main funding agents (federal government, state governments, social health insurance). The management system is that decisions are made by only three main funding agents.

Progress has been made in increasing single discharges and reducing inpatient treatment. An important achievement of the reforms was that the proportion of procedures performed in the day hospital and increased in recent years, thus avoiding overnight stays (for example, in cataract surgery). In addition, the number of hospital admissions under conditions that can usually be treated in an outpatient setting (hospital-to-hospital avoidance) is reduced.

⁹ S.B., Buletsa, 2020, C. 49-60, (in Ukrainian).

Patient care is an important step in strengthening primary care. At the same time, as the transition from inpatient to outpatient care continues, a number of issues remain unresolved. The envisaged structural changes in the reform are gradual rather than transformative, as constitutional responsibilities remain unchanged, especially for funding.

Finally, cost containment can help reduce cost growth if stakeholders continue to follow the rules of the new management system. However, cost containment will not necessarily lead to the relocation of services away from the stationary sector. Rather, it requires further structural reforms and improved access to increased funding for outpatient care. In addition, the reduction of inpatient care should go with the expansion of outpatient care to provide quality medical services in the future¹⁰.

Italy. The Italian National Health Service (Servizio Sanitario Nazionale) was established in 1978 with the basic principle of universal coverage, solidarity, human dignity and health. It is based at the regional level and organized at the national, regional and local levels. Under the Italian constitution, the central government controls the distribution of tax revenues for state-funded health care and determines the national package of legislative benefits to be offered to all residents in each region. In 19 regions and two autonomous provinces, they are responsible for organizing and providing health services through local health departments. Regions enjoy considerable autonomy in determining the macrostructure of their health systems. The local health departments are managed by a general manager appointed by the governor of the region, who provides primary care, medical care, outpatient specialized care, and health care related to social assistance. The National Health Service covers all citizens and foreign residents. Coating is automatic and universal. Since 1998, undocumented immigrants have had access to urgent and necessary services.

There are two types of private health insurance: corporate, for which companies cover employees and sometimes their families, and non-profit, with individuals buying insurance for themselves or their families. Policies, collective or individual, are provided by non-profit organizations. The market is characterized by three types of non-profit organizations: voluntary mutual insurance organizations, corporate and collective funds organized by employers or professional associations for their employees or members.

¹⁰ Andrea E. Schmidt; Florian Bachner; Lukas Rainer others, 2018, pp. 21-24

Prescription drugs are divided into three levels according to clinical efficacy and, in part, cost-effectiveness. The first level (class A) includes rescue drugs and methods of treatment of chronic conditions and is covered in all cases; the second (class C) contains all other drugs and is not covered by the NHS. There is an additional level (class H) that includes drugs that can only be delivered in a hospital setting. The three levels are regularly updated by the National Pharmaceutical Agency based on new clinical data. For some categories of drugs, therapeutic plans are prescribed, and prescriptions must comply with clinical recommendations¹¹.

Dental care is generally not covered, with the exception of children under the age of 16, vulnerable groups and people in economic and emergency situations. Depending on the region, public funds are allocated by local health units to public and accredited private hospitals.

In 2012, there were about 187,000 beds in public hospitals and 45,500 in private accredited hospitals. Public hospitals are run by local health departments, or operate as semi-independent state-owned enterprises. The group-based diagnostic payment system operates nationwide and generates most of the hospital's revenue, but generally does not apply to hospitals that directly manage local health units, where global budgets are shared. Prices include all hospital expenses, including doctors' expenses. Training hospitals receive additional payments (typically 8% to 10% of total revenue) to cover additional training costs. There are significant interregional differences in the prospective payment system, such as fee setting, which services are excluded and which tools are used to influence care schemes.

Doctors on the basis of the hospital are paid workers. Doctors working in public hospitals are prohibited from treating patients in private hospitals; all doctors who treat private patients in public hospitals pay a portion of the hospital's additional income. Due to the regionalization of the health care system, most innovations in health care take place at the regional rather than the national level, where some regions are considered leaders in innovation.

In April 2015, the Italian Ministry of Health approved an order to reorganize hospital care. The decree classifies public hospitals into three groups:

¹¹ Andrea Döring and Paul Friedemann, The German healthcare system. *EPMA Journal* 2010, pp. 545-546.

Basic hospitals (for a population of 80,000 to 150,000), emergency departments, internal medicine, general surgery, orthopedics, availability of radiology, laboratory tests and blood bank on call.

First-level hospitals (150,000–300,000 inhabitants), with the same departments as basic hospitals, as well as obstetrics, pediatrics, cardiology with intensive care units, neurology, psychiatry, oncology, ophthalmology, otolaryngology and urology.

Second-level hospitals (600,000–1,200,000 inhabitants), namely, expanded emergency departments and facilities for the treatment of very complex patients (or conditions).

In addition, the decree introduces a minimum level of activity and quality thresholds for several procedures. Examples include at least 75 surgeries per year for femoral fractures in second-level hospitals, and the requirement that at least 60 percent of patients 65 years of age and older admitted for femoral fractures should be operated on within 48 hours.

In January 2017, the government approved an updated version of the "basic levels of care". The new document makes significant changes in health care: vaccination programs; outpatient care with a significant review of treatment methods that can be provided by the National Health Service; and inpatient care, with subsequent transfer of treatment to outpatient facilities. The government estimates an additional cost of € 800 million (\$ 860 million) per year¹².

There is no general law on health care in Italy that defines the vision of health care in the country. Regular three-year National Prevention Plans are developed, which guide the general direction of health care and outline the main elements of health and disease promotion.

At the national level, the main responsibility for health care lies with the Ministry of Health, which is supported by the National Health Council (Consiglio Superiore di Sanità, CSS), which brings together representatives of national government agencies, scientists, doctors and other recognized experts appointed by the Minister of Health. The Council works through an executive committee, a general assembly and five sections involved in various health and social care issues, including health planning, health care and training of medical staff, blood and blood products, organ transplantation, medicines and medical devices, prevention of infectious

¹² Andrea Donatini; Emilia-Romagna, *The Italian Health Care System*.

diseases, food and nutrition safety, animal health and welfare, veterinary prevention, medicines and food for animals¹³.

There are about 3,000 hospitals in France, of which about a third are privately commercial, a fifth are private non-commercial, and the rest are public. Patients can choose between public and private facilities, and insurance usually covers both segments. France is characterized by a relatively large number of hospital beds per capita - 6 hospital beds per thousand citizens, compared with the average in the European Union - 5 hospital beds per thousand citizens. Public hospitals make up about 60% of hospital beds. In 2016, 1,100 public hospitals were organized into 150 territorial hospitalie groups (*groupements hospitalier de territoire*), encouraging better planning of health care opportunities and more efficient procurement. In addition, the private hospital sector continues to consolidate due to low profitability in the sector.

Hospitals are mainly funded through the French system (*groupes homogènes de séjours-GHS*), which covers both inpatient and outpatient care. The GHS system covers all hospitals: public, private commercial and private non-commercial. Each GHS gives a one-time rate, which is determined annually. Medicines for inpatient drugs are included in GHS tariffs, except for innovative, expensive drugs. For public and non-commercial private hospitals, the salaries of medical professionals are covered by the GHS system. For commercial private hospitals, the services of medical professionals are not covered by the GHS system, but are paid separately. GHS rates are usually lower for private hospitals for profit, the difference of which is mainly justified by the differences between the cases. DRG systems essentially function as a service charge. This means that the productivity of public and private hospitals in France is boosted.

In addition to the GHS, French hospitals receive funding for emergency care and the use of expensive medical technologies, procedures and medicines, and public and non-profit hospitals receive block grants for organ transplants, psychiatry, long-term care and emergency care.

Self-employed medical professionals in private hospitals are paid on a paid basis. The fee is predetermined, but in some cases doctors are allowed to bill more than the tariffs. Medical professionals who work in public hospitals are usually paid employees, and they are usually allowed

¹³ Andrea Poscia, Andrea Silenzi, and Walter Ricciardi, 2018, p. 125.

to accept private patients, for the services provided they receive a fee and pay hospitals a percentage of this amount¹⁴.

France. France is generally perceived as a country with broad patient rights. Indeed, the French Public Health Code stipulates that the patient's right to choose a healthcare professional and a hospital is a fundamental principle of French health law. Despite patients' refusal to seek secondary care directly without first agreeing with their "preferred physician", the freedom to choose physicians is not in fact limited, as patients can still choose the physicians they want to visit (with or without referral) and it is easy to switch the desired doctors by filling out the form with the chosen doctor.

Therefore, patients may ignore the physician of their choice and, when referred to a specialist, may visit any specialist in the specialty, even if he or she is not a specialist designated by the physician. In addition, patients can always visit another GP or specialist without a referral, although they are entitled to a lower level of reimbursement if they do so. However, the real choice, especially for a health professional, may be unscheduled and off-site.

Information about patients about the care process is provided by law and must be provided in a clear time. There are a number of tools to promote awareness of patients' rights, including:

- Charter of Rights and Freedoms (La charte des droits et des libertés), which defines the principles that apply to all hospitalized patients, including non-discrimination, respect for dignity and confidentiality, the right to information, protection, informed consent and independence;

- an information booklet provided to each person admitted to the hospital;

- a specific "admission agreement" to be provided to persons admitted to the institution for a long period (more than 2 months), signed by the patient or his representative; and

- assistance by a qualified doctor to respect the rights of the patient.

Courts have repeatedly ruled that a signed document is neither necessary nor sufficient to fulfill an informed consent obligation, as physicians may ask a patient to sign a form without providing sufficient information.

¹⁴ Improving healthcare delivery in hospitals by optimized utilization of medicines, 2019, pp. 37-38.

The recommended form of information and consent is to record in the patient's medical record, to which the patient can access, accurate information about the process and procedures. However, many professional organizations continue to use information booklets that patients must sign before undergoing an invasive procedure. For people with disabilities there is access to hospitals and offices of health workers¹⁵.

The European Commission's Digital Single Market - The Strategy includes three pillars to improve health and the health sector in the EU: 1) ensure access and exchange of personal health information across borders to go beyond electronic prescriptions and patient summaries; and establishing full compatibility of EMR of member countries and the European format of electronic records exchange; 2) connect and share health data to provide research, better diagnosis and improve health; 3) strengthen the empowerment of citizens and individual assistance through eHealth solutions and new models of care¹⁶.

Many countries are implementing the electronic medical record (EMR), a digital version of a traditional paper medical record for a person. An EMR is a medical card within a single facility, such as a hospital or clinic. In 2016, the share of primary care practices using EMR was about 80% on average in 15 EU countries, although there are large variations used in all or almost all primary care practices in Russia, Denmark, Estonia, Finland and Greece, Spain, Sweden and the United Kingdom, its use was much more limited in Croatia and Poland. In Denmark and the United Kingdom, the proportion of primary care practices using EMR doubled between 2012 and 2016¹⁷.

Ukraine. The reform of the health care system in Ukraine began in 2016 and consists of 4 stages, which are planned by the Ministry of Health to ensure all citizens of Ukraine equal access to quality health services and to restructure the health care system so that its center is patient. All departmental medical institutions, such as hospitals for railway workers, Chernobyl victims or civil servants, should be open to all citizens and work according to the same rules, so in 2020 medical institutions of all

¹⁵ K.K. Chevreul; Berg Brigham; I. Durand-Zaleski; C. Hernández-Quevedo *France: Health system review*. Health Systems in Transition, 2015, pp. 54-56.

¹⁶ European Commission, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on enabling the digital transformation of health and care in the Digital Single Market; empowering citizens and building a healthier society, 2018.

¹⁷ Health at a glance: europe, 2018, OECD/european union.

levels will switch to the National Health Service funding model under the Law on State Financial Guarantees. medical care of the population ". From 2020, the country will have a united medical space. Departmental institutions, such as Feofania and the National Academy of Medical Sciences, will also begin the transition to "money follows the patient" funding and become open to all. "

For the first time, patients have a clear understanding of what free medical services will be provided under the medical guarantee program. The program of medical guarantees will include primary, specialized outpatient, inpatient medical care, as well as emergency, palliative and rehabilitation care. For example, to receive a scheduled medical service, guaranteed to be paid by the NHS, you must: have an e-referral from your family doctor, therapist, pediatrician or general practitioner; choose the institution and doctor you like; NSZU will cover a certain list of services in a certain medical institution. And will pay for this service of the institution where it was provided; make an appointment; come at the appointed time and receive medical care; if the service was of poor quality, the doctor demanded money - you need to file a complaint to the NHSU by phone.

Medical institutions of all levels of health care in 2020 will switch to a new funding model and will have a contract with the National Health Service. Medical services under the medical guarantees program will be paid for by the National Health Service of Ukraine under direct agreements with medical institutions. Institutions will start working according to the Commercial Code of Ukraine. This means that hospitals will no longer work as state employees, but will become non-profit enterprises. They will be able to independently manage their own funds, draw up a financial plan, plan the purchase of equipment and repairs, freely form the salary of their medical staff. A competitive market will begin to form, which will give impetus to the development of successful institutions.

Today, local authorities face several simple tasks that have already been accomplished for the primary level: Autonomization of all medical facilities they own and computerization and connection of facilities to eHealth.

The foundations are being laid for effective procurement of medicines at the regional level. The State Procurement of Medical Procurement of Ukraine, which is to take over the function of centralized procurement of drugs and medicines at the expense of the state budget, will also work with the market to reduce prices, combine local procurement, conduct

framework procurement, form and maintain electronic catalogs for pre-threshold procurement of medical products. Procurement through a state-owned enterprise is not mandatory for regions. But to use the funds effectively, they will be able to turn to a centralized procurement organization for tenders and procurement under framework agreements, which will allow them to purchase more quality drugs at a lower cost. That is, the process of creating a united medical space in Ukraine continues. Time will tell whether it will be effective for patients and doctors.

Other countries. In most European countries, patients can view the information contained in their electronic record (except for Croatia, the Czech Republic and Ireland), and in half of these countries (Denmark, Estonia, France, Greece, Latvia, Luxembourg, Spain and Sweden) patients can also interact with your records, for example, to add or change information¹⁸.

Most countries are in the transition from paper to electronic form - ePrescribing, but the implementation of ePrescribing varies greatly in different regions of the EU. EPrescribing, allows doctors to issue prescriptions that can be obtained at the pharmacy in electronic form, which increases the accuracy and efficiency of distribution of pharmaceuticals. Most countries are moving from paper to electronic prescriptions, but the introduction of electronic prescriptions varies greatly across the EU. In 2018, more than 90% of prescriptions were received electronically in pharmacies in Finland, Estonia, Sweden, Denmark, Portugal and Spain. On the other hand, ePrescribing has not yet been implemented in several countries (such as Bulgaria, Cyprus, France, Germany, Ireland, Luxembourg, Malta and Poland), although all of these countries have stated that they plan to start implementing ePrescribing at the regional or national level within the next few years.

Conclusions. Thus, many governments in the European region are reviewing their health care systems and the suitability of existing approaches to the financing, organization and delivery of health services, and the European Union has both positive and negative experiences with the united medical space. However, health care reform is inherently a normative norm, as well as an economic and organizational activity.

¹⁸ J. Oderkirk, "Readiness of electronic health record systems to contribute to national health information and research", 2017.

Health care reform measures are assessed not only by short-term budget savings for the population, but also by their ability to promote health and generate health benefits for the entire population.

The united medical space should be formed on the basis of human-centeredness, bioethics and be a key medical standard. States systematize health care legislation and implement and comply with international law. The medical space should concentrate the powers of public and private health care facilities to fully realize and ensure patients' rights to health care. The patient must be the goal of health care reform, his interests must be a priority in health care reform. We must not forget about medical workers, protection of their honor, dignity and protection of their rights, participation in the formation of standards of the medical profession and control over their observance. Medical care provided to patients should be affordable and high quality, funded by public or private insurance companies. The united medical space in European countries is to facilitate the patient's access to a medical card, medicines, quick access to medical care, but as analyzed from the experience of Germany, Italy, Austria and France, the question of the priority of medical care and waiting time for medical care remains open. In Ukraine, the process of creating a united medical space continues.

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FORMATION OF THE RESEARCH SKILLS OF THE FUTURE TEACHERS OF PRIMARY SCHOOL: EDUCATIONAL-CONTENT RESOURCE OF THE EXPERIMENTAL RESEARCH

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Abstract: *The article reveals the problem of formation of research skills of the future teachers of Primary school. It is proved it is advisable to realize according to such stages of the professional training of the future teachers of the Primary school: the preparatory, project-research and educational-professional. In particular, in the educational-methodical tutorial "The Methodic of Labor Training and Artistic Work" the content of*

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the independent and individual work is proposed in the logical consequence according to the project activity. The content of the course "The Technology of Projecting within the Primary School" which is revealed in the educational tutorial, is oriented on the development of different groups of research skills. The educational textbook "The Modern Technologies of the Acquaintance of Younger Pupils with the Objects of Nature" contains the author's topics for the Term papers, based on the project activity which allows improving the level of the research skills.

There are presented the results of the experimental research of the future primary school's teachers, which proves the effectiveness of the developed educational-content resource."

Keywords: *the institution of higher education, educational-professional program, primary school's teacher, research skills, educational-content resource*

Introduction

Formulation of the problem. Within the modern conditions of the implementation of the new content of the education, within the implementation of The Concept of New Ukrainian School¹ the quality of the theoretical and practical training of pedagogues is being considered as the most important factor of the stable and constant development of the country. It causes the increasing of the requirements to the future teacher of the Primary school and the objective necessity of the improvement of the teacher's training. Thereby there is the important task: to take into account modern methods and technologies which are oriented on the modernization of the education's system according to the requirements of our time, according to the science's achievements, according to the culture and practice.

According to V. Andrushchenko, the educational process gains certain vectors due to the practice, because the practical orientation of the received knowledge significantly increases the social value of the knowledge².

Thus, according to the educational-professional program 013 Primary education, for the Bachelors, the future teachers of the Primary school should master knowledge, practical skills, skills of teaching all educational fields of the State Primary Education's Standard³ and they must use them

¹ New Ukrainian school: a guide for teachers, 2017. Kyiv.

² V., Andrushchenko, The main directions of optimizing the interaction of practice and education in modern Ukrainian society. *Vyshcha osvita Ukrainy*, (4), 2017, 5-12.

³ State standard of primary education, 2018,

skillfully during the solving of the pedagogical, educational-edifying and educational-methodical tasks. In their turn the programs of the Primary school assign the tasks for the teacher which include the formation of the pupils' research skills: „research skills and ability of pupils to observe the objects and phenomena of the living and inanimate nature”; „ways of pupils' educational-cognitive activity, their mental actions and operations with the help of analysis, comparison and classification of the natural objects ” (“I'm Exploring the World” “Natural Science”); „mastering generalized ways of actions; modeling of the cultural and life's role-playing standards of behavior ” (“I am within the World” 3-4 grades of school); “formation of the Primary school pupils' ways of independent work with the children's books, formation of the skills to realize the research, choice of the information for the solving of the educational tasks” (“Literary reading” 3-4 grades of school); “formation of the initial skills to find, to use, to create and to distribute the messages and data, implementing the informational-communicative technologies” (“Stairs to the Informatics” (3-4 grades of school)⁴. Thus, the future Primary school teacher must not only master the complex of the research skills, but also he must be able to form such skills during his work with pupils⁵. Thus, there is the objective necessity to increase the requirements to the professional competence of the specialists, in particular, to the formation of the future teachers' research skills and their readiness to develop pupils' research skills⁶.

The analysis of the recent research works and publications.

Within the conception of the development of the pedagogical education⁷, it is characterized the state of the modern pedagogical education; it is also underlined the perspectives of its development in future⁸. Besides, it is mentioned the problem of imbalance between the

<https://www.kmu.gov.ua/ua/npas/pro-zatverdzhennya-derzhavnogo-standartu-pochatkovoyi-osviti>.

⁴ Curricula for secondary schools with instruction in the Ukrainian language. Grades 1-4 (2011). Kyiv.

⁵ Organizational forms of education in primary school: posibnyk (2017). Kyiv.

⁶ Typical educational programs 1-2 and 3-4 grades. New Ukrainian school (2019). Kyiv.

⁷ The concept of the New Ukrainian School (2017),

<https://www.kmu.gov.ua/storage/app/media/reforms/ukrainska-shkola-compressed.pdf>.

⁸ The concept of development of pedagogical education.

social demand and highly-qualified specialists; between the global social, technological changes and reality of the system of pedagogical education; readiness/ability of modern teachers to accept and to realize modern educational reforms in Ukraine. Within the context of our research there is the determinative thesis of the Concept, according to which pedagogues must develop and implement the new content, methods (technologies) of teaching; to study the best experience of the educational society and to use it creatively within own activity. This proves the necessity of formation of the research skills of future teachers of Primary school.

Within the Project of Standard of Higher Education⁹ there was outlined the content of the professional training of future pedagogues and its effective component in the form of totality, summation of the disciplines' (subjects') and special (professional) competences which are revealed in the skills of higher education's applicants not only to solve traditional tasks, but also to solve complex, complicated pedagogical tasks which are the main characteristics of the research skills.

The analysis of the scientific research has proved that during the last decades within our national pedagogical science there were realized special research works on the content of the professional-pedagogical skills¹⁰ and peculiarities of the formation of research skills of certain specialists, namely¹¹: future teachers of the Foreign languages¹², Labor Training¹³, Geography, Music¹⁴, social sciences¹⁵; medical colleges'

<https://mon.gov.ua/ua/npa/pro-zatverdzhennya-koncepciyi-rozvitku-pedagogichnoyiosviti>.

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¹⁰ O. Ostrianska, Formation of complex pedagogical skills in future primary school teachers. *PhD dissertation (Pedagogical sciences)*. Kyiv. 2002.

¹¹ Slastenin, V., Podyimova, L., *Pedagogy. Innovative activity*. Moscow. 1997.

¹² M. Kniazian, Navigation-primary schooling students as well as relevant professionally significant knowledge (based on foreign language courses). *Extended abstract of PhD dissertation (General pedagogy and the history of pedagogy)*. Odessa. 1998

¹³ E. Kulyk, Theory and practice of training Maybutnogo teachers of labor orientation to pedagogical dostalnosti. *Extended abstract of PhD. dissertation (Theory and methodology of professional education)*. Ternopil. 2006.

¹⁴ M. Falko, Formation of research skills of future music teachers in higher pedagogical educational institutions. *PhD dissertation (Pedagogical sciences)*. Kyiv. 2005.

¹⁵ I. Yermakova, Training of the Maybuty teacher of the suspension of disciplines to the pre-secondary technology at the professional. *Extended abstract of PhD dissertation (Theory and methodology of professional education)*. Kirovograd. 2011.

students¹⁶, future teachers at universities of Great Britain¹⁷ etc. However, nowadays it is still underdeveloped the problem of formation of future Primary school's teachers' research skills in general and with the help of the organization of different kinds of activity, in particular, project activity.

The goal of the article is the elucidation of the peculiarities of the realization of the educational-content resource of the formation of research skills of the future Primary school teachers within the process of the project activity and results of the experimental research.

Theoretical basis of research

On the basis of the study of psychological-pedagogical literature on problem of our research we defined the term "The Research Skills of the Future Primary School Teachers" as the integrated creation of the mental and practical actions which provide: the realization of the research activity by the students; evidence, availability and formation of the mastered ways of conducting different researches, effective solving of the non-standard professional tasks within the conditions of the modernization of the general Primary education and are based on the knowledge of basis of the research activity, experience of its organization.

In order to describe the process of formation of the research skills of the future Primary school teachers we must define the skills which must be formed. There are some classifications of the research skills¹⁸. Thus, N.Nedodatco classifies the research skills according to their structure which consists of three components: intellectual (knowledge, mental operations of analysis and synthesis, comparison, generalization, systematization, abstraction, modeling, ability to describe objects, stating of the problem, stating of the hypothesis and its solving, research and implementation of analogy, deduction, proof); practical (using of the educational, reference and additional literature, selection of tools and materials for the experiment, measurement of the quantities and indexes during the process of experiment, presentation of the research's results in the form of graphics, tables, diagrams); self-organization and self-control

¹⁶ T. Babenko, Form of pre-graduate knowledge and skill of students in medical college in the process of design. *Extended abstract of PhD dissertation (Theory of learning)*. Kyiv. 2016.

¹⁷ I. Popovych, Form of pre-dignity of the Maybuty teacher at the University of Great Britain. *Extended abstract of PhD. dissertation (Theory and methodology of professional education)*. Ternopil. 2018.

¹⁸ O. Rohozina, Form of pre-school education at maybutnian labor teachers. *Extended abstract of PhD dissertation (Theory and methods of labor orientation)*. Kyiv. 2007.

(planning of the work, rational use of time and means of activity, regulation and realignments of own actions, self-checking of the received results, self-esteem)¹⁹.

However M.Falco determines another groups of the research skills: analytical-synthetic and informational (to analyze, to synthesize, to generalize, to classify the scientific information; to realize the informational research within the system of the Internet; ability to describe the pedagogical phenomena; to use the scientific thesaurus); diagnostic skills (to determine the certain subject of the diagnostics; to develop the diagnostic tools and to describe thoroughly the techniques of its implementation within the pedagogical process; skills of the self-diagnostics of the level of readiness for the research activity); prognostic-projecting (skills to model the pedagogical activity; skills to predict the consequences of the pedagogical process; skills to predict the ways of the correcting disadvantages)²⁰; creative-innovative (to find smth new in the pedagogical phenomena; to make the selection of the methodical concept of own work; to predict the research-experimental work)²¹.

Each of the types of the research skills is the complex integrated formation, which has the intellectual activity and knowledge as the integral part. In its turn, the level of the skills' formation depends on the quality of knowledge, which makes up the tentative basis of the further actions. This will provide the ability to act in the quickly changing situation and to understand deeply the responsibility and own duties. For this there are necessary some transformations as: constructive transformations of the content, forms and methods of the professional training at higher school, reorientation to productivity – skills to realize the project and research activity, to analyze phenomena of the surrounding reality on the basis of the humanistic cultural-educational orientations²².

¹⁹ N. Nedodatko, Formation of teaching and research skills of high school students. *Extended abstract of PhD dissertation (Theory of learning)*. Kharkiv. 2001.

²⁰ L. Horbatiuk; H. Aliksieieva; N. Kravchenko; V. Lypych & T. Rozumna, Use of Mobile Applications for Foreign Language Lexical Competence Formation. *Journal of History Culture and Art Research*, 8(3), 2019, 113-124.

<http://dx.doi.org/10.7596/taksad.v8i3.2093>

²¹ Ibid. Article 19

²² O. Serbova, H., Lopatina, H. Aliksieieva, & N. Tsybuliak, *Features of Economic Socialization of Children with Disabilities*. *Journal of History Culture and Art Research*, 8(3), 2019, 162-178. <http://dx.doi.org/10.7596/taksad.v8i3.2195>

The analysis of the scientific research convinced us that within the structure of the research skills of the future teachers of Primary school we must determine types which should be formed during the process of the professional training: (scientific-research search of the necessary literature and information from this literature, collecting and presentation of the information in the form of tables, pictures, schemes, graphics, diagrams, diagnostics of the level of readiness of the research activity), cognitive-operational (mastering mental operations of analysis and synthesis, abstraction and concretization, comparison, highlighting of the main (important)), technological-project (planning of the work, creation of the model, selection of methods of research and evaluation of its results), communicative-reflexive (regulation and self-analysis of own organization of the cooperation with another participants of the common activity, its self-esteem).

Research methods

Within our research we used such methods: analysis and synthesis of the philosophical, pedagogical and psychological references and literature which give the opportunity to define the character of the main notions of the research; systematization and generalization of the educational-methodical ideas on questions of the formation of the research skills of the future Primary schoolteachers; their classifications; generalization of the teacher's own pedagogical experience within the system of training of Bachelors on educational-professional program 013 Primary education; interpretation of results of the experimental work which was conducted among the pedagogues of the institutions of higher education (20 persons), teachers of primary schools (57 persons) and applicants for higher education, who study for the educational-professional program 013 Primary education (325 persons). The total number of respondents is 402 persons.

Results and discussions conceptual framework

Implementation of the educational-content resource of the formation of the research skills of the future Primary school teachers.

During the process of developing of the experimental teaching we relied on the scientists' research works which regulated the conducting of the pedagogical experiment²³. The fundamental statements of scientists

²³ V. Zahviazynskyi, *Methodology and methodology of didactic research*. Moscow: *Pedahohyka*. 1982.

became the theoretical foundation of its organization and selection of the methods of the work with the received results. As the goal of the further research activity there was determined the developing and approbation of the model of formation of the research skills of the future Primary school teachers during the process of the project activity, giving students the opportunity to realize the research potential, to actualize the ability for the creative activity²⁴.

The methodic of the ascertaining and forming experiment involved students of Berdiansk State Pedagogical University, Kirovogradsky State Pedagogical University named after Volodimir Vinnichenko, Cherkassi National Pedagogical University named after Bohdan Khmalnintsky. Besides, the experiment involved teachers of Primary schools of Zaporizhzhya and Dnipropetrovsk regions who have the experience of the professional work (1-3 years of the professional activity). At different stages of work 325 students, 57 teachers and 20 pedagogues of high educational institutions participated in the research.

The total amount of respondents includes 402 persons. The control groups from the same educational institutions included 160 students.

According to the determined structure of the research skills (organizational-research, cognitive-operational, technological-project, communicative-reflexive skills) we developed the educational-content resource of the experimental research. This resource included some general-pedagogical disciplines and methodic of teaching, pedagogical practice and independent scientific-research activity of students, participation in the creative groups, special course "The Technology of Projecting (Designing) within the Primary School", which provided the continuing studying during the educational process within the higher educational institution.

The research's logic involved its realization according to the determined stages. It was provided by the tasks at each of mentioned stages with the help of the educational-content resource of training and involved stages of the scientific-pedagogical research which are described in details in the Figure 1.

At each stage of the experimental teaching the main attention was given to the developing of the certain types of the research skills, but flexible interconnection and transfer from one stage to another allows determining the integrity of the process of formation of the mentioned skills.

²⁴ I. Lerner, *Didactic foundations of teaching methods*. Moscow: *Pedahohyka*. 1981.

Let's take a brief look at the peculiarities of the educational-content resource of formation of the research skills of the future Primary school teachers according to each of the given stages.

The goal of the preparatory stage was the formation of the organizational-research and cognitive-operational skills. At this stage the experimental work was oriented on the development of interest and aspiration for the realization of the independent pedagogical research works; understanding of the importance of the research skills for the future professional activity; aspiration for the constant renovation and enrichment of knowledge about the fundamentals of the conducting of the scientific research within the field of the Primary education.

For the achievement of this goal we implemented such forms of the classroom and extracurricular work of the students: lectures, practical seminars, independent, individual work. These forms of work were implemented at the project-research and at other stages of our research work during the professional training at higher educational institutions.

During the experimental work along with the traditional lectures we used lectures of the research type: lecture with the planned mistakes, lecture-visualization, lecture-dialogues, lecture-press-conference, and project lecture with the goal of formation of the research skills. The mentioned types of lectures were oriented on the increasing of the interest and aspiration for the realization of the independent pedagogical research works; providing of the aspiration for the constant renovation and enrichment of knowledge about the problems of the modernization of the modern primary education.

During the experimental teaching we have actively implemented the lectures of the research character, particularly, the project lectures. The training for this lecture begins 2-3 weeks earlier than the stated term, because the students must be united into the work research groups. Each group studies one question on the given topic or theme. During the lecture the students present reports which become the basis for the further discussion of the problematic questions. The task of this lecture is the creation of conditions for the interaction of the future teachers of the Primary school with the teachers; public presentations of the processes material, mastering knowledge about the conducting of the independent research works. This provides the formation of the organizational-research and cognitive-operational research skills of the organization of the cognitive activity.

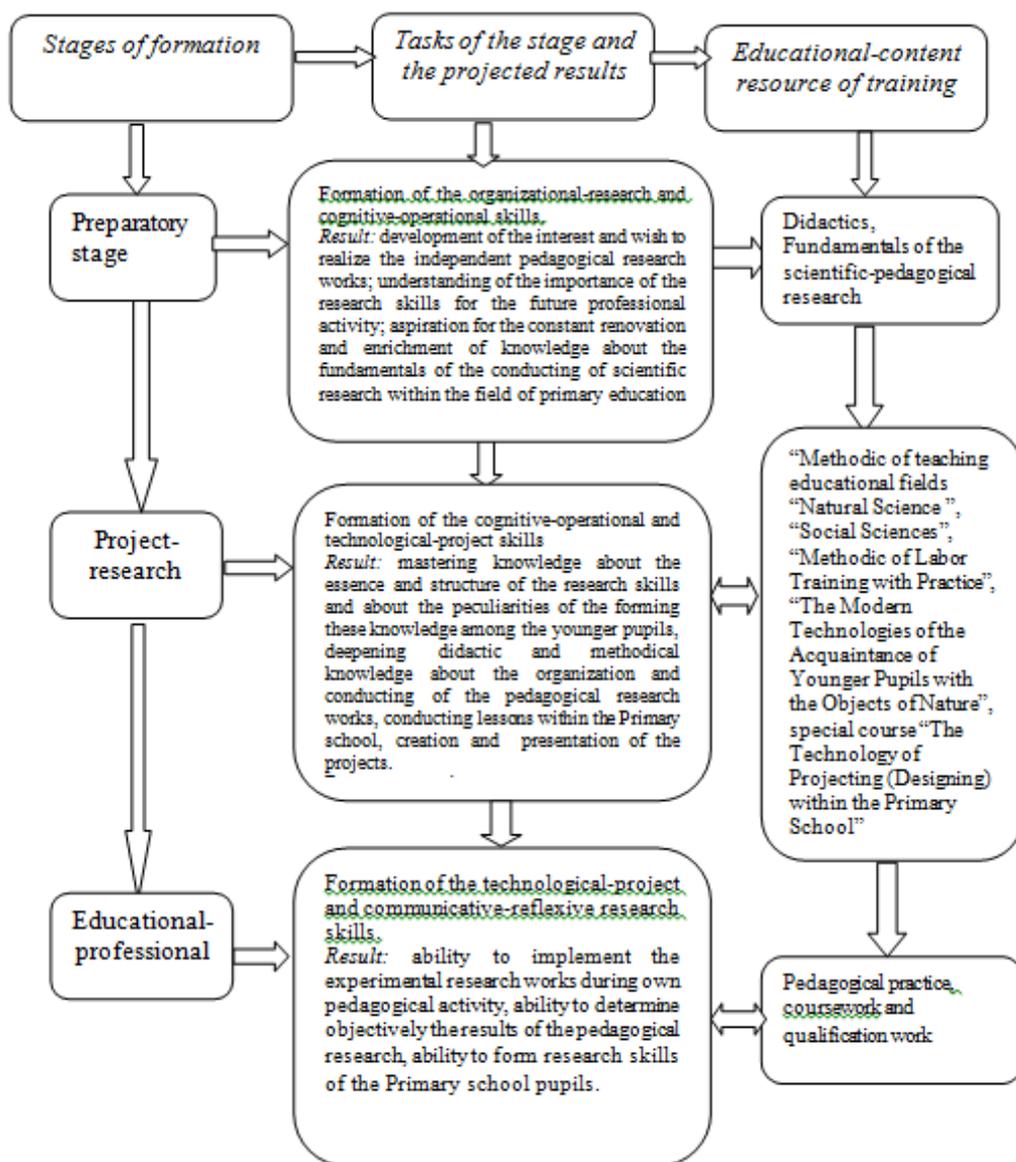


Figure. 1. Process of the formation of the research skills of the future Primary school teachers during the process of project activity

Let's reveal on the specific examples the process of formation of the organizational-research and cognitive-operational skills during the work with the course "Didactics".

The traditional program of the academic discipline "Didactics" contains main notions, terms, scientific concepts, determines the theoretical and practical content of the discipline, during the experiment, so we implemented some correctives into this discipline. Thus, we added

new terms “projecting” and “project activity of the future teachers of primary school” to the topic “Technology of teaching”.

For example, the problem lecture “The essence of the project activity within the Primary school” provided the studying of such questions: different approaches of pedagogues for the determination of the term “project activity”; peculiarities of the classification of projects within the scientific literature; possibilities of the implementation of the method of projects during the lessons within the primary school.

The conducting of the problem lecture provided the setting of the educational-research tasks. This is the presentation of their content.

The educational-research task 1. During the process of the preparation for the lecture give your own determination of the terms: “project”, “project activity”, “projecting, and designing”. Rely on the proposed literature and prove your thought. Prepare for the discussion of the mentioned notions during the lecture (organizational-research skills).

The educational-research task 2. Choose the right statement of the theorists and practitioners about the organization of the project activity within the primary school, its effectiveness and place them according to the order of importance. Prove the chosen order of the importance during your presentation (organizational-research skills).

The educational-research task 3. Relying on the analysis of the regulatory documents, prove and justify the necessity of the implementation of the project activity into the educational process of the primary school. Make your own additions to the proposed argumentation (cognitive-operational skills).

The goal of the project-research stage of the experimental teaching was the formation of the cognitive-operational and technological-project skills. This goal was realized with the help of the addition of the educational-research tasks to the certain disciplines to the curriculum of the professionally oriented training of Bachelor (educational-professional program 013 Primary education). Thus, such tasks were added to disciplines: “Methodic of teaching educational fields “Natural Science within the primary school”, “Social Sciences” within the primary school, “Methodic of Labor Training with Practice”, “Special course “The Technology of Projecting (Designing) within the Primary School”.

In particular, during the learning of the course “Methodic of teaching educational fields “Natural Science within the primary school” there was given the lecture “Technology of projecting at lessons from courses “I am exploring the world” and “Natural Science” within the primary school”.

Along with the classroom forms there was proposed the organization of the independent and individual work which was oriented on the deepening formation of the cognitive-operational and technological-project skills.

During the experiment there was assumed such organization of the educational process which would provide the conditions for the maximum productivity. The program of the experimental research considered peculiarities and relatively stable character of teaching, certain progressive development during the process of the formation of the research skills of future teachers of primary schools.

In addition, to the academic discipline "Methodic of Labor Training with Practice" we added the lecture "Implementation of method of project at Labor training lessons", also we added the practical seminar "Methodic of organization of the project activity of younger pupils at labor training lessons". This was reflected in the redeveloped and supplemented edition of the tutorial²⁵.

For example during the process of studying of the academic discipline "Methodic of Labor training with practice" as the goal was chosen the theoretical comprehension by students of their practical activity within the primary school, because the mentioned course is organically combined with the pedagogical practice where their gained research skills are realized.

The independent work included: the studying of certain questions on the topic which were prognosticated by the curriculum; training for the presentation during the practical lesson and provided the formation of the organizational-operational and cognitive-operational skills.

The individual work on course "Methodic of Labor training with practice" prognosticated the creation of the creative project (according to the independently chosen topic) and creation of craft's items which were the objects of lessons of labor training within the primary school²⁶ During the process of its realization we created conditions for the full implementation of the creative possibilities of the future specialists with the help of the individually-oriented development of the personalities, with the help of research and creative activity (Table 1).

²⁵ A. Kramarenko, K. Stepaniuk, *Methods of labor training and artistic work*. Donetsk. 2011.

²⁶ A. Kramarenko, K. Stepaniuk, *Modern technologies of acquainting junior schoolchildren with objects of nature*. Berdyansk. 2015.

Table 1
The content of the individual work on the course "Methodic of labor training with practice"

CM	The content of the individual work
Content module 1	Organization of work on performance of the individual-research task. Defining of the theme, goal and tasks. Defining of the ways of problem solving.
Content module 2	Gathering of information on theme of the individual-research task and analysis of this information. Defining of resources of information and methods of its gathering. Observation, work with literature, references, surveys, experiment. Conspectus of references.
Content module 3	Preparation of scientific abstracts on the theme of the creative project.
Content module 4	Drawing up of the detailed plan-conspectus of the lesson on the theme of the creative project.
Content module 5	Production of labor's objects, technological cards, illustrative material for the lesson.
Content module 6	Creation and registration of report about the realization of the individual-research task. Conclusions, presentation and defense of portfolio.

Thus, individual work is completely corresponds with logic of the project activity, it provides the formation of the research skills of the future teachers of primary school within the limits of studying professional methodic, in particular: technological-project and cognitive-operational.

At the project-research stage during the experimental teaching we implemented the course "Technology of projecting within the primary school" which provided the formation of certain group of skills which composed the basis of our classification: organizational-research, cognitive-operational, technological-project and communicative-reflexive.

The content of the course “Technology of projecting within the primary school” was structured according to principles: scientific, systematic, interaction, educational reflection, cross-curriculum.

The basis resource supplement of the teaching course was the author’s tutorial (textbook), “Technology of projecting within the primary school”. The methodological fundamentals and methodic apparatus of the tutorial allow setting the teaching on the subject basis, to increase the level of its personalization. This provides the effective achievements of the planned results of teaching, in particular: formation of research skills of the future teachers of primary school.

During the implementation of the course “Technology of projecting within the primary school” prognosticated the project activity of the future teachers of the primary school during the process of the conducting practical lessons, particularly during the lectures and during the independent work.

Let’s consider in details forms and methods which were implemented during the studying course “Technology of projecting within the primary school”. These forms and methods were oriented on the formation of the research skills of the future teachers of the primary school (organizational-research, cognitive-operational, technological-project and communicative-reflexive).

The formation of the organizational-research skills of the future teachers of the primary school prognosticated the performance of such project tasks by the students.

1. Outline the main fundamentals of the scientific-methodical articles about the problem of the maintaining the method of projects within the pedagogical theory and practice, relying on the scientific-methodical literatureko and magazines (“Primary School”, “Native School”, “Tell your Grandchild” etc.). Choose some definitions of the term “method of projects” and compare them; choose the best definition and prove your choice.

2. Prepare the scientific report on the proposed themes: “Pedagogical projecting: reality and prospects”, “Meaning of the scientific research in the professional activity of the future teacher of the primary school”, “Necessity of the studying experience of the teachers-innovators during the lessons within the primary school”, “Conditions of the formation of the research competence of the future teachers of the primary school”.

3. Arrange the bibliographic list of references (5 last years) on the

problems of implementation method of project within the primary school, which were published in the professional publications. Explain your choice of these references.

The students' activity was directed on the development of the all groups of skills: to organize real research, creative, independent activity; to different methods and forms of the independent work; to provide the mental development; to maintain the business contacts between the teachers and students.

Educational-professional stage of the experimental teaching prognosticated the formation of the research skills of the future teachers of the primary school during the process of the project activity provided the formation of the technological-project and communicative-reflexive research skills. In particular, at this stage there took place the modeling and conducting of the lessons on different subjects of the primary school. Such organization of the educational process allowed students to master practically the fundamentals of the project activity.

Within the context of research we needed to increase the research character of the pedagogical practice for the providing of the formation of the technological-project skills. In this order during the initial conference we proposed to the future teachers of the primary school individual themes for the development of the lessons on different subjects of the primary school, including the tasks of the individual character. Considering the research orientation of the professional-pedagogical practice we defined the program of the practice on the basis of the project activity.

Within the discipline "Methodic of Labor training with practice", "Modern technologies of teaching Natural Science, social and health-saving education fields at the primary school" students performed the course works which were the complex research and combined knowledge of the future teacher of primary school about the disciplines of the psychological-pedagogical cycle with some methods of primary education. During the performance of this work students implemented all the types of the research skills: cognitive-operational, organizational-research, technological-reflexive.

The themes of the course works, which were developed and suggested by the author, had the orientation on the project activity of the future teachers of the primary school. These themes for the course works included such themes: "Method of projects as the way of realization of the

technology “design-education””; “Development of the creative abilities of younger pupils during the process of the performing projects with the hand-craft art”; “Project “The wonderful world of origami” and its realization during the items’ constructing at the Labor lesson within the primary school”; “The project day “Paper-plastics” within the primary school and methods of its conducting”; “The project “The doll-motanka” at the lessons of Labor training within the primary school”; “Methodic of organization of the educational cooperation of the younger pupils and teacher during the lessons of the Nature science within the foreign research works”, “ways of the effective implementation of the personally-oriented technology within the educational course “I am exploring the world” within the context of the new Primary school’s State Standard”, “Technology of conducting research projects within the course “Natural Science”; “Technological fundamentals of the projecting and constructing of the educational process on course “Natural Science, “Implementation of new pedagogical and informational technologies for the acquaintance of younger pupils with the objects of nature in the context of national and foreign experiences”; “Formation of the ecological responsibility of the younger pupil within the context of the technologization of the primary school”; “technological aspect of the project activity of the younger pupils on course “I am exploring the world”.

Such organization of work allows future teachers of primary education not only to identify research skills, but the ability analyze difficulties which appeared during the process of the research’s conducting; to evaluate critically own activity at each stage of course work’s writing; to use different methods of evaluating of the younger pupils’ activity; to implement various forms of control during the performing of the professional activity.

Thus the main goal of the educational-professional stage was the formation of the technological-project and communicative-reflexive skills. Besides there was realized the further development of the organizational-research and cognitive-operational skills which was provided at preparatory and project-research stages. The conducted research gives reasons to affirm that the most intense formation of all groups of research skills of the future teachers of primary school took place at educational-professional stage. Such work provided the creation of the special professionally-oriented environment. This provided the optimal realization of the logics of the research activity within the process of the students’ educational activity.

As the final result of the realization of the educational-content resource of formation of research skills of the future teachers of primary school during the project activity we consider the student's personality with the high level of the formed research skills. From the pedagogical point of view it is the creation of the author's supplement of the process of formation of the students' research skills. This was reflected in some educational textbooks (tutorials) which were approved by the Ministry of Ukraine "Methodic of Labor training and Artistic work" which was written in the cooperation with A.Kramarenko²⁷, "Modern technologies of acquaintance of younger pupils with the objects of nature"²⁸ and "Technology of projecting within the primary school"²⁹.

The analysis of the conducted survey, results of the pedagogical practice, solving of the pedagogical tasks, performing of the tests' tasks and comparison of results which were obtained during the ascertaining and final control, proved the increasing of the level of formation of the research skills of the future teachers of primary school within the process of project activity.

The generalized results of the formation of the research skills of the future teachers of primary school according to the results of the experimental education are represented in the Table 2.

Implementation of skills within the educational activity: Scientific-research of educational literature, references, registration of the research's results in the form of tables, schemes, diagrams (Organizational-research OR); Mastering operations of analysis, synthesis, ability to abstract, to specify, to compare, to define the main (essential), to compare new facts and phenomena, to update the acquired knowledge (Cognitive-operational CO); Work's planning, creation of the model of the scientific research, composing and solving of the pedagogical tasks, receiving of the theoretical results and checking of these results (Technological-project TP); Participation in discussions, generalization of the material within the report, regulation and self-analysis of own pedagogical activity, self-esteem (Communicative-reflexive CR).

²⁷ Ibid. Article 30

²⁸ Ibid. Article 31

²⁹ K., Stepaniuk, *Design technology in primary school*. Donetsk, 2012.

Table 2

Formation of the research skills of the future teachers of primary school according to the results of the experimental education

Types of research skills	Implementation of skills within the educational activity	Ascertaining control (AC)				Final control (FC)			
		Control group (CG)		Experimental group (EG)		Control group (CG)		Experimental group (EG)	
		Amount of students	%	Amount of students	%	Amount of students	%	Amount of students	%
Organizational-research	OR								
	Often	15	9,3	17	10,5	19	11,8	83	50,3
	From time to time	100	62,5	103	62,3	103	64,3	77	46,7
	I don't implement	45	28,2	45	27,2	38	23,7	5	3
Cognitive-operational	CO								
	Often	8	5	7	4,3	14	8,7	69	41,8
	From time to time	97	60,6	103	62,4	106	66,3	90	54,5
	I don't implement	55	34,4	55	33,3	40	25	6	3,7
Technological-project	TP								
	Often	13	8,1	18	10,9	20	12,5	115	69,8
	From time to time	86	53,7	93	56,4	101	63,2	40	24,2
	I don't implement	61	38,2	54	32,7	39	24,3	10	6
Communicative-reflexive	CR								
	Often	15	9,3	13	7,8	20	12,5	133	80,6
	From time to time	76	47,5	78	47,1	83	51,8	26	15,7
	I don't implement	69	43,2	74	44,9	57	35,6	6	3,6

The results from the table give reasons to affirm that within the students' activity the organizational-research skills were often used only by 9,3% of students from the control group and by 10,5% of students from the experimental group. After the conducting of the final control this index increased to 50,3% of students from the experimental group. Before the experimental education 27,2% of the future teachers didn't implement the mentioned skills; after the implementation of the model we revealed only 3% of respondents with such characteristics.

The significant increasing of the implementation of the organizational-research skills was provided by the implementation of the educational-research tasks which were oriented on the search analysis of the educational references, resources, arranging and composition of the bibliographic lists; by the addition of the problem issue to the traditional lectures.

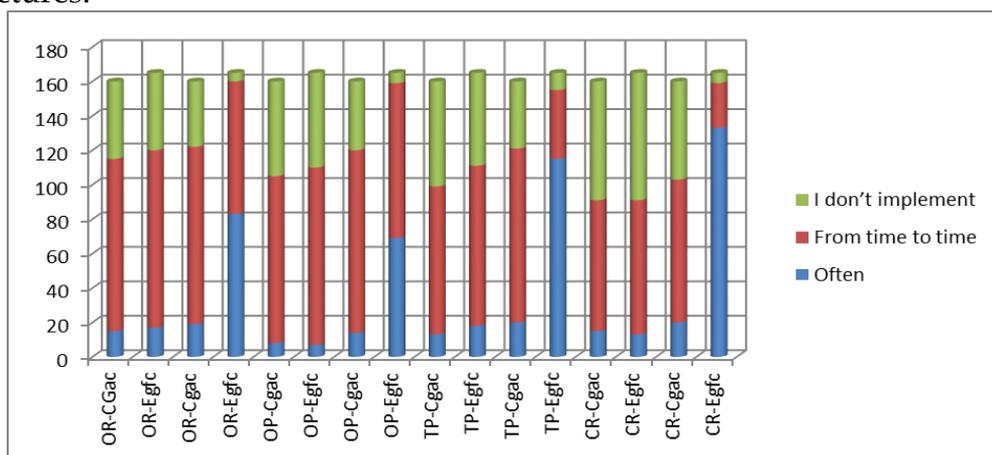


Figure. 2. Formation of the research skills of the future teachers of primary school according

The cognitive-operational skills before the experimental education were actively used only by the 5% of respondents from the experimental group and only by 4,3% of respondents from the control group. After the final control this index was increased almost 10 times in the experimental group (41,8% of respondents from the experimental group). The results within the control group showed only 8,7%. These increasing of results in the experimental group were received due to the implementation of complex of forms and methods of work, problematic lectures, practical lessons with the orientation on the project activity, business games, etc.

Before the experimental training the cognitive-operative skills were

actively used by 5% of respondents from the experimental group and only by 4.3% respondents from the control group.

After the final control in the experimental group this indicator increased almost 10 times to 41.8%; in the control group the results increased only to 8.7%. Improving the level of formation of future teachers of the primary school of the studied skills contributed to the use of a complex of forms and methods of work: problematic and project lectures, practical classes with a focus on project activity, business games, discussions and more.

According to the results, which were presented in the table, after the ascertaining control only 8,1% of respondents from the control group and 10,9% of respondents from the experimental group often implemented technological-project skills. The conducting of the experimental research allowed to increase this index to 69,8%. In the control group there was no significant increasing of this index (12,5%). This proves the effectiveness of the model of formation of the research skills of the future teachers of the primary school. The increasing of indexes was proved and provided by: the performing of the educational-research tasks, developing projects, analysis of the innovative pedagogical experience, writing of the course works, articles about the results of own research works, participation in the work of training groups, including of the tasks (with the project character) into the quasi-professional activity of students.

According to the table's results we can state that the communicative-reflexive skills were not implemented (before the experimental education) by 43,2% of students of the control group and by 44,9% of students of the experimental group. After the conducting of the final control this index reduced to 3,6% of students within the experimental group; the index "I use them often in my own activity" increased from 7,8 % to 80,6%. This proves the effectiveness of the implementation of the model of formation of the research skills of the future teachers of primary school during the project activity, which was provided with the help of developing of projects, by the presentation of these projects, by the participation in discussions on problems of the general primary school, by the creation of criteria of the evaluation of the project activity of younger pupils, by the writing reports about the pedagogical practice.

The generalized data for all kinds of research skills of the future teachers of primary education according to the ascertaining and final control are represented in the Table 3.

Table 3
Level of mastering generalized research skills by the future teachers of primary school

	Implementation of skills during the educational activity					
	Often		From time to time		I don't implement	
	Amount of students	%	Amount of students	%	Amount of students	%
Average index for generalized types of research skills (ascertaining control)	19	4,9	220	68,6	86	26,5
Average index for generalized types of research skills (final control)	207	63,7	107	32,9	11	3,4

The control groups during the experiment included 160 respondents. The experimental groups included 165 respondents. The conducting of the final control gave reason to distribute students according to the levels of the formation of the research skill of the future teachers of primary school during the process of the project activity. Within the control groups with the low level of the formation of the research skills - 75 students (47%); with the medium level - 56 (35%); with the high level- 29 students (18 %).

Within the experimental groups with the low level of the formation of the research skills - 10 students (6%); with the medium level - 63 (38%); with the high level - 92 (56%).

Levels of formation of research skills of the future teachers of primary school during the project activity within the experimental groups and control groups are represented in the Table 4

Table 4

Levels of formation of research skills of the future teachers of primary school during the project activity within the experimental groups (EG) and control groups (CG) (%)

Criteria Levels of Groups students	Motivational			Cognitive			Operational		
	High	Medium	Low	High	Medium	Low	High	Medium	Low
Experimental group (ascertaining control)	7	40	53	17	32	51	5	40	55
Control group (ascertaining control)	9	34	57	12	36	52	9	38	53
Experimental group (final control)	33	61	6	31	59	10	41	51	8
Control group (final control)	18	40	42	20	42	38	27	39	34

According to the results which were represented in the table, the low level of the motivational criteria of the formation of the research skills of the future teachers of the primary school (experimental groups) during the final control was detected only in 6 % of respondents. The medium level was detected in 61% or respondents, the high level was detected in 33% of respondents from the experimental groups

Within the control group the low level was demonstrated by 42% of respondents, the medium level was demonstrated by 40% of respondents and the high level was demonstrated only by 18%. Such results are explained by the fact that the students of the control groups were involved into the project activity, which was oriented on the formation of the research skills only periodically and episodically.

The results of the experimental research define that during the teaching at first level of higher education (Bachelor, specialty 013 Primary education) the development and implementation of the author's supplement, which was oriented on the formation of the research skills, is the effective way of formation of the mentioned skills

The process is reflected in details in the content of the tutorials (textbooks) "Methodic of Labor training and Artistic work", which was written in cooperation with A.Kramarenko¹, "Modern technologies of the acquaintance of younger pupils with the objects of nature" which was written in the cooperation with A.Kramarenko² and "Technology of projecting within the Primary school", which were proved by the long approbation within Berdiansk State Pedagogical University and within other institutions of higher education of Ukraine

Conclusion

The results of the conducted research give reasons to affirm that the changing of the amount of students, who were distributed according to the level of their research skills, is connected with the level of firm motivation and interest in education of the future primary school teachers.

However the obtained experimental data prove the expedience of the implementation of the developed educational-content resource which was oriented on the formation of the research skills of the future teachers of primary school during their project activity. This is confirmed by the thoroughly mastering knowledge by the students; it also confirmed by the high level of the professional competence, by the mastering modern methods of research, by the creative implementation of the research skills during the professional activity, by the development of the reflection.

Thus, the implementation of the educational-content resource during the process of the professional training of the future teachers of primary school, implementation of different forms (lecture, practical lessons, independent and individual work); implementation of the renovated courses "Methods of Labor training with practice", "Technology of projecting within the primary school", "Modern technologies of teaching natural science, social and health-saving educational fields within the primary school", orientation of the pedagogical practice on the project activity and the personally-oriented development of the future teachers of primary school within the conditions of the realization of the Concept of New Ukrainian School, renovation of the themes of the course works give reasons to affirm that the project activity provides the increasing of the students' research skills.

According to the requirements of the modern times the chair of

¹ Ibid. Article30

² Ibid. Article 31

primary education of Berdiansk State Pedagogical University works intensively on the creation of the educational environment for the future teachers of the primary school which gives opportunity to prepare specialists to the work within real conditions of the New Ukrainian School.

As the perspective direction of our further research we consider the scientific-practical reasoning of the organizational-methodical supplement of the formation of readiness of the future teachers of primary school for the realization of the project activity, comparative research works devoted to the formation of the research skills of specialist of primary education in Ukraine and in European countries; formation of the professional competence of the future teachers of primary education during the process of the project activity.

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THE MEDIA AND MECHANISMS UTILIZED IN NIGERIA TO FORCE WOMEN INTO SUBORDINATE POSITION

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Abstract: *Agitation and continued demand for gender equality and for women to be accorded rights, akin to the rights enjoyed by men have quadrupled. Available data indicates that this demand has yielded significant results, mostly, from countries in the western hemisphere. Despite the above, women are still trapped under the yoke of so many social, political, and cultural practices that force them into subordinate position, hence the need to ascertain and elucidate on these mechanisms. To that extent, it is unclear whether mechanisms of subordination exist in Nigeria. This paper seeks to uncover and to bring to the fore mechanisms or practices that subjugate and force women into subordinate position. In order to ascertain, identify, and sieve-out these mechanisms of subordination, cultural, religious, political, constitutional and statutory provisions of relevant legislations were thoroughly perused, as well as, the role of the media and all documents (Reports) germane to the discuss. The study concludes, amongst others, that mechanisms of subordination of women exist in Nigeria, and that these mechanisms of subordination are found in the diverse cultures, religions, education, workplace, laws, amongst others. Further, it concluded that, in this regard, the role of the media is essential and vital, particularly, in exposing and disseminating information bothering on the mechanisms of subordination outlined. The Paper, amongst others, recommends that the media should utilize its potentials to disseminate and expose information bothering on the mechanisms of subordination of women in Nigeria, with a bid to massing public opinion against it, and by extension, ensuring its obliteration.*

Keywords: *Mechanisms, Subordinate position, Women, Media.*

Introduction

Women have had an overdose of unequal treatment comparative to the men. Back in the days, the world had wondered whether women were humans to be accorded human right.

In Nigeria, women are even treated less, with some cultures providing, tacitly, no inheritance, no recognition nor respect for them.

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They are oftentimes, treated as chattel, discriminated upon, abused, humiliated and denied opportunities. Same, also, pervades our various offices, intuitions and establishments, thereby occasioning monumental injustice, subjugation, and by extension, forces women into subordination.

These acts, oftentimes, are perpetuated in the glare of people's view, whilst the Nigerian society, including the press sits akimbo, and does tangibly nothing. Available data shows that the press' informatory role has been docile in this regard. With no concerted efforts geared towards exposing these affront on the female gender. Despite the fact that the Constitution¹ of the Federal Republic of Nigeria prohibits all forms of discrimination, as well as, the United Nations Convention on the Elimination of all forms of Discrimination against Women (CEDAW)² and the African Charter on Human Peoples' Right (ACHPR)³. Ekeanyanwu⁴'s elucidation captured the informatory role of the press succinctly thus, as a vital component of our lives and existence. He further quips that no society can exist or survive without the communication, which he asserted as exchange of ideas, views, information, experiences and sharing of meanings between persons, nations, society and cultures.

In the light of the above, this paper attempts to study the crucial mechanisms that places women in a subordinate position in Nigeria and the informatory role of the press. It will as well, identify, sieve-out, and distill the mechanism that engenders this eclectic situation (subordination), amongst others.

Human right and women's right

As a scholar puts it that the world is not bereft of the idea of what women's right means, but the will power to do things that promote and engender equal right to the genders. This finds expression in several international, regional and domestic law regimes. For proper understanding of this work, some of the law regimes will be x-rayed

¹ Constitution¹ of the Federal Republic of Nigeria (CFRN) 1999, as amended, Section 42.

² United Nations Convention on the Elimination of all forms of Discrimination against Women (CEDAW), 1979, Article 5. Became operational in Nigeria in 1981 and ratified in 1984.

³ African Charter on Human Peoples' Right (ACHPR), 2005.

⁴ Nnamdi Ekeanyanwu, "The Nigerian Press Coverage of Political Conflicts in a Pluralistic Society." *Global Media (African Edition): Otta-Nigeria*, 2012, pp. 64-91.

and/or pointed-out, so as to distil and elucidate what constitute women's right vis-à-vis human right.

Article 1 of the Declaration of Human Rights, states that all human beings are born free and equal⁵. This, to a great extent, blurred the distinctiveness of human right, and amplified and echoed the fact that women and men were born as free and equal entities that enjoy same rights⁶. However, in practice, this seems not practicable as women were downgraded to second-class human beings, especially in Africa. And always at the receiving ends of the society, which relies solely and heavily on traditional and cultural practices obnoxious to the rights of women. These ugly trend, inclusive of violence against women, subjugation and subordination of women, prompted the United Nations General Assembly, in 1979, to adopt the articles expressed in the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW). Same was also ratified by Nigeria in 1984. Article 5 of CEDAW⁷ encourages nations to modify the social and cultural patterns of conduct of men and women and the view to eliminate inferiority and superiority of either sexes or stereotype-role of men and women.

In the same vein, the African Union in its solemn Declaration on Gender Equity in Africa affirmed the principle of gender equality as enshrined in Article 1 (1)⁸. Furthermore, in article 7, enjoins member states to actively promote the implementation of legislation to guarantee women's land, property and inheritance rights, including the right to housing⁹. Also, Article 18 of the ACHRP¹⁰ states that "the State shall ensure the elimination of discrimination against women and also ensures the protection of the rights of women". Interestingly, the charter was domesticated in Nigeria in form of the African Charter on Human and Peoples Rights (Enforcement and Domestication) 1990. This Act makes the provisions of the Charter enforceable in any Court of Law in Nigeria.

Furthermore, Article 21, in the bid to curb denial of right, subjugation and subordination of women, states that a widow/widower shall have the

⁵ United Nations Declaration of Human Rights, 1948, Article 1.

⁶ Constitution, CFRN 1999, Chapter 4. n 1

⁷ CEDAW, 1979. n 2

⁸ The Constitutive Act of the African Union, Article 1 (1).

⁹ The Constitutive Act of the African Union, Article 7.

¹⁰ The African Charter on Human and Peoples Rights (ACHPR), 1981, Article 18. Domesticated in Nigeria in form of the African Charter on Human and Peoples right (Enforcement and Domestication) Act Cap 10, 1990.

right to inherit each-others' property in the event of death whatever the matrimonial regime is, and to continue living in the matrimonial home. Sub paragraph (2) of the above states that "women and girls shall have same rights as men and boys to inherit in equal shares their parents' properties"¹¹. Instructively, this was also ratified by the Federal Republic of Nigeria in 2004. But, in reality and despite the legal regimes in Nigeria, and the domestication of the charters expressed above, these charter-provisions and the legal regimes are inoperative in the Nigerian society, as obnoxious cultural practices and others alike, against women still pervade.

Gender Equality

According to International Planned Parenthood Federation (IPPF), Gender equality is measurable equal representative of women and men and does not imply that woman and man are the same, but that they have equal value and should be accorded equal treatment"¹². United Nations, in support of the above, posit that "gender equality is a human right"¹³. It furthers that "empowering women is also an indispensable tool for advancing development and reducing poverty"¹⁴ (which is also one of the mechanism for subordination of women).

In the same vein, UNICEF expressed that gender equality means that women and men, and girls and boys, enjoys the same rights, resources, opportunities and protections. It does not require that girls and boys, or women and men, be the same, or that they be treated exactly alike¹⁵. Also, Cambridge Business English Dictionary¹⁶ defined gender equality as the act of treating women and men equally and that it does not imply that women and men are the same, but they have equal value and should be accorded equal treatment. These buttress the importance attached to gender equality, and prompted the inclusion of same as one of the goals of the United Nations Millennium Development Goal (MDG) Project, which principal aim, amongst others, was to end world's poverty. Similarly, the MDG Project claims that every single goal of the MDG is directly related

¹¹ The African Charter on Human and Peoples Rights (ACHPR), n 10

¹² International Planned Parenthood Federation (IPPF) report 2014

¹³ United Nations Report 2010

¹⁴ United Nations Report n.13

¹⁵ UNICEF's 2010 Gender Policy on promoting Gender Equality: An Equity-based Approach to programming. www.unicef.org Retrieved 2020-12-4.

¹⁶ Rosalind Combley, Cambridge Business English Dictionary (London: Cambridge University Press, 2011).

to women's rights. And that society where women are not accorded equal rights as men can never achieve development in a sustainable manner¹⁷.

Importance of gender equality and Justice

Several scholars have opined that enthronelement of gender equality and justice is germane and sine-qua-non to a better society. This assertion may have prompted the World Bank, in its Report¹⁸ to assert that gender equality enhances economic development, improves prospects for future generations and strengthens political and social systems. It further adds that in spite of the fact that women now constitute or comprise more than 40% percent of the world's labor force, they still lag behind men in terms of earnings and productivity, and faces greater obstacles when it comes to participation in social and political institutions. Particularly, in the developing nations, the gender gaps hinder economic and social development, and destabilizes the political environment.

Mechanisms for subordination of women in Nigeria

Violence

Violence against women (VAW), also known as gender-based violence¹⁹ and sexual and gender-based violence²⁰ (SGBV) is collectively, violent acts that are primarily or exclusively committed against women and girls. And the said acts of violence are committed against women and girls expressly, because they are female. The United Nations declaration on Elimination of Violence Against Women captured it all in one of its provisions - that "violence against women is a manifestation of historically unequal power relations between men and women" and violence against women is one of the mechanisms by which women are forced into a subordinate position compared with men²¹.

Kofi Annan, former Secretary-General of the United Nations, magnified the level of this violence against women. He asserts that

¹⁷ United Nations Millennium Campaign (2008): No 3 Gender Equality. www.un.org/millenniumcampaign Retrieved 2020-12-04.

¹⁸ World Bank Annual Report 2012. www.openknowledge.worldbank.org

¹⁹ Nancy Felipe Russo, and Angela Pirlott, "Gender-based violence concept, methods, and findings" *New York Academy of Science*, 2006) 1087: 178-205

²⁰ Promoting gender equality to prevent violence against women. www.worldbank.org; Sexual and Gender-based Violence. www.who.int retrieved 2020-12-04

²¹ Declaration of Violence against Women. United Nations General Assembly resolution 48/104 of December 20, 1993. www.un.org Retrieved 2020/12/04

“violence against women and girls is a problem of pandemic proportion. At least one out of every three women around the world has been beaten, coerced into sex, or otherwise abused throughout her lifetime, with the abuser, usually, someone known to her²².

These VAW can fit into several broad categories. These, include, violence carried out by individuals, as well as States. Some of the forms of violence perpetrated by individuals are: rape, domestic violence, sexual harassment, reproductive coercion, female infanticide, prenatal sex selection, obstetric violence, and mob violence, as well as harmful customary or traditional practices, etc. whilst the following are violence perpetrated or condoned by the State: War-rape, sexual violence and sexual slavery during conflict; forced sterilization; forced abortion; violence by the police and authorities’ personnel; stoning and flogging, amongst others. Also, many form of VAW, such as trafficking in women and forced prostitution, are often perpetrated by the organized criminal network²³. All these emasculate, subjugate and form as a catalyst utilized to force women into a subordinate position.

It is also to be noted that in spite of the condemnation of these forms of VAW and its perpetrators; and the protocols enacted by the UN for protection of women from violence, they still persist till today, even at a pandemic proportion, as asserted by Kofi Annan²⁴.

In Nigeria, this violence (VAW) takes several forms, including domestic violence, early and forced marriages, female genital mutilation, widow torture and inheritance related violence. And more recently, violence occasioned and perpetrated by the several militia and cult groups in the Niger-delta; and banditry and the nefarious activities of the outlawed Boko Haram group in the Northern part of Nigeria. Also, in the bid to quell and suppress these activities, security agencies are deployed in the areas impacted.

This, according to the echoes from the impacted areas, the security agencies are said to violate and perpetrate further violence against

²² Azad Moradian, *Domestic violence against single and married women in Iranian society*. (Chicago School of profession Psychology, 2010).

²³ Elilsabeth Prugl, *Violence Against women*. (Gender and international Affairs class, 2013).

²⁴ Kofi Annan cited in *Domestic violence against single and married women in Iranian society*, Azad. Moradian, no 22.

women²⁵. This lends credence to the position held by several scholars that when a culture of armed gang violence takes root in a society that does not recognize and respect women's rights, the resultant effect is that it quadruples gender-based violence.

This situation is oftentimes entrenched and oiled by the proliferation of guns, which has, by the estimation of several scholars increased the risk of sexual assault on girls and women. Okon²⁶ also opined that 'the consequences of these precarious situation has been disastrous, as women have suffered massive massacre, rape, sexual abuse, social psychological trauma, aggravated poverty, unemployment, hunger, anger, low self-esteem, bitterness, frustration, desperation, tension and fear of more conflicts'.

The author asserts that the above conditions further exacerbate subordination of women, as they can only break-even by depending on men for 'existence' and survival. Oftentimes, the assistance from men-folks come with a price, which may include, but not limited to sexual gratification.

Laws

a) Statutory and constitutional inhibitions Law in Nigeria

Irrespective of the numerous rights provided by the Constitution²⁷, there are some that inhibits the women and by extension, subjugate and subordinate them to men, they are as follows:

- i) Section 29 (4) (b)²⁸ provides thus: "any woman who is married shall be deemed to be full age". The advocates of anti-child marriage see this law as bad for women and another way to debase and subordinate womanhood.
- ii) Language of the Constitution: The language used by the constitution is not gender neutral, perhaps, because, it was drafted by men. For example, the pronoun "He" appeared in the 1999 Constitution about 235 times. Some advocates have

²⁵ Amnesty International Annual Report 2015 -2019. www.amnesty.org. retrieved 2020-12-04.

²⁶ Emma Okon, Report of Niger Delta women for Justice (NDWJ) on the Deltas women's siege on American Oil Company, Chevron-Texaco in Delta State, Nigeria, 2002. <http://www.ndwj.kabissa.org> retrieved 2020-12-04.

²⁷ Constitution, CFRN 1999, n 1.

²⁸ Ibid

recommended for the replacing of “he” with “a person” or “He and She”.

- iii) Government appointments and composition of agencies: The neutrality espoused by section 14 (3) of the Constitution²⁹ is worrisome and a clear display of insensitivity to women. The section did not disabuse or discourage dominance of male gender in government, but only abhors predominance of persons from a few State or from a few ethnic or other sectional groups in Government or its agencies. This provision has made it impossible for the Bill seeking 35 percent affirmative action for women, brought to the Nigeria National Assembly (the legislative branch of government dominated by the male gender) to see the light of the day (to be passed into law).
- iv) Citizenship Right: Section 26 (2) (a) of the Constitution³⁰ confers the right of citizenship to any women who is married to a Nigerian citizen, but denies such right to foreign men married to Nigerian women.
- v) Right to Privacy and domestic violence: Section 37 of the Constitution³¹, provides the right to privacy. This right, as is currently enshrined, has no exception, and may serve as the leeway to perpetuate subordination of women, child marriage and domestic violence, because of its’ exclusion of everybody from intruding into a person’s private matters.
- vi) Indecent assault on males and females: The disparity in punishment for the offence of assault in the criminal code discriminates the women. The author quips that discrimination breeds subjugation and subordination. Section 353³² provides that “any person who unlawfully and indecently assaults any male person is guilty of felony, and is liable to imprisonment for three years. The offender cannot be arrested without warrant”. Conversely, section 360³³ provides that “any person who unlawfully and indecently assaults a woman or a girl is

²⁹ Ibid

³⁰ Constitution, CFRN 1999, n 1.

³¹ Ibid

³² Criminal Code Act, Laws of the Federation 2004. (Operational in the Southern states of Nigeria)

³³ Ibid

guilty of misdemeanor, and is liable to imprisonment for two years". Why the difference?

- vii) Marital Rape: Under the Nigerian criminal code a man cannot rape the wife, so is the provisions in section 282 (2)³⁴, which provides that "sexual intercourse by a man with his wife is not rape if she has attained puberty". This has also been taunted to tacitly condone the defilement of young girls.
- viii) Spousal abuse/wife beating: Section 55(1) (d)³⁵ provides that "Nothing is an offence, which does not amount to the infliction of grievous harm upon any person and which is done by a husband for the purpose of correcting his wife". One argues that this provision condones domestic violence, and may be used as a justification for subjugation, subordination, and abuse against women. It will further deepen the injustice serially melted on the women in other to cow, subjugate and subordinate them.
- ix) Burden of proof in sexual offences: Section 221 of the Criminal Code³⁶, which deals with defilement of girls less than 16 years, stipulate that:
 - a person cannot be convicted of the offence of unlawful carnal knowledge of a girl being of or Above thirteen years and under sixteen (16) years of age; or knowing a woman or girls as idiot or imbecile, has or attempt to have unlawful carnal knowledge of her, upon the uncorroborated testimony of one witness.

The above provision does not in any way protect or promote woman, but rather, provides impetus to sexual predators to continue to perpetuate the commission of the offence, knowing fully-well that the corroborative testimony required to ground conviction may be, strictly speaking, impossible, because no person with the aim of committing such crime, will

³⁴ Penal Code Act, Laws of the Federation 2004. (Operational in the Northern states of Nigeria).

³⁵ Ibid

³⁶ Criminal Code Act, Laws of the Federation 2004.

invite people to come and watch/or would commit such in the presence of people.

b) Inhibitions of relating to workplace

In Nigeria, women are precluded from performing certain functions, roles and activities in their workplace. Some of these inhibitions are expressed in the statute and law establishing the institutions, agencies and paramilitary organizations, amongst others. For instance: section 55³⁷ prohibits women from working in the night. The section provides that “no woman shall be employed on night work in a public or private industrial undertaking or in any branch thereof, or in any agricultural undertaking or any branch thereof”. The only exception is for nurses. Also, Section 56³⁸ provides that women are prevented from engaging in any underground work in any minefield.

Further, women are denied the opportunity of being accompanied by their spouses in their place of employment or posting in the service. This provision is not applicable to men by virtue of Section 34(1)³⁹, which stipulates that “men who are employed in the public service in Nigeria are permitted to be accompanied by such members of their families not exceeding two wives and children under sixteen years”. The worse in these inhibitions, discriminations and injustice are found in the Nigeria Police Regulations⁴⁰, where:

- i. Police women on duty are prohibited from putting on jewelry, except wedding or engagement rings and/or wristwatches; applying face-powder, lipstick or colored nail varnish⁴¹.
- ii. Police women are required to place the alphabet “W” before their rank whereas it is not same with the male colleagues.
- iii. Police women married to civilian husbands are disallowed from living in the police barracks, while same does not apply to the men.

³⁷ Nigerian Labour Act, Laws of the Federation 2004.

³⁸ *ibid*

³⁹ *Ibid*

⁴⁰ Nigeria Police Regulations (A subsidiary regulation referred to in section 128 of the Nigerian Police Act, 2020)

⁴¹ Nigerian Police Regulations, Section 128.

Similarly, section 121⁴², provides that women police officers shall, as a general rule, be employed on duties which are connected with women and children. Also, Section 124⁴³ provides, among other things, that:

A woman police officer desirous of marrying must first apply in writing to the Commissioner of Police, in-charge of the State Police Command, in which she is serving, requesting permission to marry, and stating the name, address and occupation of the person she intends to marry. Permission will be granted for the marriage if the intended husband is of good character and the woman police has served in the force for a period not less than three (3) years.

Pathetically, are the provisions of sections 125, and 127⁴⁴, where it is stated that a married woman police officer shall not be granted any special privileges by reason of the fact that she is married and shall be subjected to posting and transfer as if she were unmarried⁴⁵, and many be granted maternity leave, when pregnant, in accordance with provisions of general order⁴⁶. However, an unmarried woman police officer that is pregnant shall be discharge from the force; she can only be reinstated on the approval of the Inspector General of Police⁴⁷. Instructively too, the language employed by the drafters of the new Nigerian Police Act, 2020, is anything, but gender neutral. Just like the Constitution⁴⁸, the pronoun 'He' was, often and embarrassingly, utilized⁴⁹.

Other laws that inhibit women include: The National Drug Law Enforcement Agency Regulations⁵⁰, which in Article 5(1)⁵¹, provides that all female applicant shall be unmarried at the point of entry and shall remain unmarried for a period not less than two years. Also, Article

⁴² Nigerian Police Regulations

⁴³ Ibid

⁴⁴ ibid

⁴⁵ Nigerian Police Regulations, Section 125.

⁴⁶ Nigerian Police Regulations, Section 126

⁴⁷ Nigerian Police Regulations, Section 127.

⁴⁸ Constitution, CFRN 1999, n 1.

⁴⁹ Nigerian Police Act, 2020, Sections 123 (2); 124 (b); 127 (1), amongst others.

⁵⁰ National Drug Law Enforcement Agency Regulations (A subsidiary regulation to National Drug Law Enforcement Agency Act, 1989).

⁵¹ National Drug Law Enforcement Agency Regulations.

15(2)⁵², akin to the Nigerian Police Regulations, provides that all unmarried female members that wish to marry shall apply in writing to the Chairman and Chief Executive Officer of the Agency, asking for permission and stating in details the particulars of the intended husband. It should be noted that the reference of male and female officers of the Nigerian Airforce as Airmen in the Nigerian Airforce Act, discriminate, subjugate and subordinate women.

ii-iv) Cultural practices, Religion and Politics

In today's world, female children are still being discriminated upon in several ways. This discrimination is powered, and most times, reinforced by various cultural practices perpetuated predominantly in Africa. Cultures in these climes have so much preference for the male children. In Nigeria, particularly in the Southeast and some states in the South-south, female children are not allowed to inherit properties from their late parents. This is further reinforced by some of the prevailing obnoxious customs. For instance, the *Oli-ekpe* custom of Nnewi people of Anambra State, which permits the nephew or the brother of a deceased person to inherit his property to the exclusion of his female children still persist and hold-sway till today, despite the decision of the court in the case of *Mojekwu v. Mojekwu*⁵³, which held same as discriminatory. Women are still regarded as part of the husband's property, capable of being inherited by a man or men, and as such, cannot inherit her father and/or her husband's property.

The practice is that upon the demise of one's husband, a brother or kinsman of the deceased person is 'shared' or allocated the deceased person's wife as his inheritance. Worryingly is the practice in some areas in the North central part of Nigeria, where the husband willingly gives his wife to his visiting-friend, to have sexual intercourse with, as a mark of love and show of hospitality to his friend. These cultural practices inhibit the women and further subordinate and make them subservient to the men. The National Human Rights Commission (NHRC)⁵⁴ listed some other practices that inhibit, and serve as a challenge to the promotion and

⁵² *ibid*

⁵³ *Mojekwu v. Ejikeme*, 2005 NWLR 402, 1; and (1997) NWLR (pt. 512) 283.

⁵⁴ National Human Rights Commission (NHRC) 2016 Report on Human Rights Violations in Nigeria.

protection of women's rights. They include female genital mutilation, widowhood rites, child marriage and domestic violence, amongst others.

Besides the above, the practice and requirement by most Embassies and High Commissions for a letter of consent from one's husband to be presented, before visa is granted, is also another way to subordinate the women to the men. Whereas evidence abound that the same letter of consent is not a requirement, before visa is granted to the men or the husband in the same circumstance. Further, Kambarami⁵⁵ identified family as one of the institutions under culture that subordinate women. He asserted that in the family, male children are viewed and prepared as breadwinners, heads of households, and whom family property will devolve to, whilst same is not accorded to the female children, who, oftentimes, are prepared to be subservient to the male gender.

In the light of the above, Charvet⁵⁶ argued that these differentiation and discrimination justify the assertions by some scholars that the society views women as sexual beings and not human beings. Dube⁵⁷ succinctly puts it thus, that such views about women perpetuate their subordination. The author quips this makes the society to view, define, and socialize women as weak, dependent and subordinate to the men. In other to further this, women are further characterized as being soft, gentle, passivity, submissive and striving to please the men always⁵⁸. This conditioning diminishes the ability of women to challenge such teachings, which further magnifies their subordination to men. Kambarami⁵⁹ painted a vivid picture of how culture moulds and characterizes the girl children in Shona culture, South Africa, he posited that once a girl reaches puberty, all teachings are directed towards pleasing one's future husband, as well as, being a gentle and obedient wife. Her sexuality is further defined for her, as she is taught how to use it for the benefit of the male race (This culture still persists in some parts of Nigeria).

In Nigeria, as well as, other culture, the cultural practice of son-preference by many families, also perpetuate male dominance and

⁵⁵ Maureen Kambarami, *Culture, Femininity and Sexuality: understanding human sexuality*. South Africa: University of Forte-Hare, 2006, p. 17

⁵⁶ John Charvet, *Modern Ideologies: Feminism*. London: J.M. Dent and Sons Limited, 1982, p. 24.

⁵⁷ Nqobani Dube, *Culture and Subordination of Women*. Africa word press, 2011.

⁵⁸ Linda Mcdowell, and Rosemary Pringle, *Defining women: Social institutions and gender divisions*. Oxford: Polity Press, 1992.

⁵⁹ Kambarami, *Culture, "Femininity and Sexuality"* p. 18.

subordination of women. Other institutions that play pivotal role in the acculturation of male dominance, and by extension, subordination of women, are religion and politics. For instance, in Nigeria, the religious bodies are somewhat in agreement with chauvinistic and male dominance preference. The political system qua political parties is also in the same fray as most of the political positions are held by the men. Women's participation in government is still below the 35 percent stipulated in the gender policy. These serve as veritable means of making and forcing women to be subservient, dependent, and perpetually, in subordination to the men.

v). Education

Education liberates one from the shackles of ignorance and emboldens one to live above servitude. To this end, the importance of it (education) to the society and particularly, the women cannot be over-emphasized. For over a decade now statistical figures from the world bodies - World Health Organization (WHO), ActionAid, United Nations (UN), amongst others, regarding education of the girl child in Nigeria has remained abysmally low and alarming, especially, in the Northern part of Nigeria. This is made worse by the nefarious and terrorist activities of the Boko Haram⁶⁰ and Fulani herdsmen, which has reduced access to education and increased withdrawal of the girl-child from schools for the purposes of marriage or for care-giving.

According to ActionAid⁶¹, educational developments in Northern Nigeria is lagging behind other parts of the country on practically every indicator - number of facilities, transition rates, girls' enrolment, number of teachers, number of girls hawking wares or doing household chores. The agency further asserted that low girls enrolment in school is bound to aggravate gender imbalances that will skew present and future opportunities against women⁶². It should be noted that lack of education of the girl-child limits their potentials, and impacts negatively on the opportunities that will be available to them. This serves as veritable avenue, means, and a crucial mechanism for subordination of the girl-child or women to the apron-strings of men.

⁶⁰ Boko Haram (Designated as one of the international terrorist group in 2013 by the United State of America)

⁶¹ ActionAid Annual Report 2017 (On Nigeria) www.nigeria.actionaid.org

⁶² *ibid*

vi). Poverty

Poverty serves as a salient mechanism for the subordination of women in Nigeria, despite the human material resources at the behest of the country (Nigeria). According to the UNDP report⁶³, approximately, 70 percent of Nigerians are poor. The women form the majority. Hajiya Zainab Maina, former Nigerian Minister of Women Affairs and Social Development, succinctly put it thus: “that 70 percent of women in Nigeria live below poverty line⁶⁴. Same has continued to persist. Aside the above, Nigeria is ranked 118 out of 144 countries on the global gender index regarding to women’s right according to the World Economic Forum’s Global Gender Gap Index⁶⁵. This ranking shows Nigeria trailing some poorer African countries and with some nations with long history of women right abuses⁶⁶. To worsen this position, Nigeria does not have a social security plan for providing food and housing to the poor.

This makes the situation of women precarious and exposes them to sex trade, destitution and other demeaning menial activities. Which further debase, subjugate and make women subservient and subordinate to men in order to survive or eke-out a living. It should be noted that majority of the women in Nigeria depends on farming for livelihood, and for them to farm, they require land and money, which, in most cases, can only come from the men. This situation further subordinates and makes women more vulnerable to the machinations, usually, orchestrated by the men and the society.

Where does the media fit in all these?

Scholars agree that the media exist for the society. And that a symbiotic relationship exists between the media and the society, with each helping in so many ways to sharpen and better the other. In-spite of the above, scholars assert that the media play vital roles to the society – helping to inform, entertain and educate the people on tropical issues germane to their existence. In affirmation, Chukwu⁶⁷ asserts that the

⁶³ UNDP-Human Development Report 2016 and 2019 www.hdr.undp.org/nigeria. Retrieved 2020-12-04.

⁶⁴ Daily Post Newspapers (Nigeria) 13 July 2013

⁶⁵ ActionAid Annual Report 2017. www.nigeria.actionaid.org. Retrieved 2020-12-04.

⁶⁶ *ibid*

⁶⁷ Obinna Johnkennedy Chukwu, “Freedom of Information Act and Journalists access to information in Port Harcourt, Nigeria” *Global Academic Journal of Humanities and Social Sciences* (2019): 1(1), 20-24.

media's role in the society goes beyond newsgathering and dissemination of information. It also includes moulding and shaping of opinions and attitude of people, through proper and accurate analyses and interpretation of news events. This makes the media an intrinsic part of the society.

Baran and Davies⁶⁸ in validation of the exigencies of the media to the society, concluded that the media is influential and powerful, serving as the link with the government and providing for the people and government the information required to make informed decisions and formulation of policies for better administration of government and for the betterment of the people and the society at large. Available information shows that as the society grows larger the people will depend on the media to get information regarding to the society⁶⁹.

The import of the above is that the media can deploy its potential to muckrake and expose information bothering on the mechanisms of subordination outlined above. All in the bid to ensuring that these unwholesome activities are obliterated, whilst equitable and egalitarian society are enthroned. Despite these sterling attributions, the media in Nigeria still lags behind in reportage of information pertaining to the mechanism utilized to subjugate and force women into subordinate positions. Several scholars agree that evil thrives in secrecy⁷⁰ and exposition of these obnoxious mechanism of subordination and subjugation espoused above, will help, in no small measure, to stem, curb or obliterate it (mechanism of subordination).

Particularly, utilizing agenda-setting function of the press, which presupposes that the press being the watchdog of the society not only informs us, but influences our opinions in diverse ways; and set in motion debates on topical societal issues. Which could be centered on the mechanisms of subordination of women in Nigeria, with a bid to nipping it in the bud.

⁶⁸ Stanley Baran, and Wayne Davies, *Mass Communication Theory: Foundations, Ferment, and Future*, 3rd Ed. Belmont, USA: Thomas & Wadsworth, 2003.

⁶⁹ Alvin Gouldner, cited in Obinna Johnkennedy Chukwu, "Analysis of Reportage of Freedom of Information Bill in 2010 by the National Newspapers" *International Academic Journal of Education & Literature*, (2020): 1 (2) 56-24.

⁷⁰ Thomas Jefferson, cited in Obinna Johnkennedy Chukwu, "Freedom of Information Act and Journalists access to information in Port Harcourt, Nigeria" *Global Academic Journal of Humanities and Social Sciences* (2019): 1(1), 20-24.

Also germane in this regard is, the Peterson's prescriptions on the social responsibility of the media to the society, which he posits as:

- i) Servicing the political system by providing information, discussion and debate on public affairs.
- ii) Enlightening the public so as to make it capable of self-government.
- iii) Safeguarding the rights of the individuals by serving as watchdog against government⁷¹.

And the principles of development communication, which, amongst others, emphasizes the use of communication to negate society's entropic situation (such as women's right), and galvanization of the people to participate in the obliteration of inequality and activities that subordinate and subjugate women, which scholars view as part of nation building and development.

Available evidence abounds and shows that the media can utilize the above prognosis to highlight and cause actions towards curbing the menace of subordination of women in Nigeria, as it (Media) did in the past, where, through persistent dissemination of information, amongst others, was able to mobilize and galvanize the people to push for the enactment of Freedom of Information Act 2011, and tackle government's policy on fuel subsidy removal in 2012; stood against third-term or President Olusegun Obasanjo tenure elongation; and for enthronement of democratic government in Nigeria⁷², amongst others.

Conclusions and Recommendations

It is concluded that mechanisms of subordination of women exist in Nigeria. These mechanisms of subordination are found in diverse cultures, religions, workplace, laws, amongst others. These mechanisms of subordination highlighted the restriction placed on women with regards to certain occupations, ownership of property, subjected to violence, treated with ignominy and reckless abandon, amongst others, certainly,

⁷¹ Christopher Paterson, *Development communication*, (Chicago: The Museum of Broadcast Communication, 2005)

<https://www.museum.tv/eotvsection.php?entryode=development>, para.1-8
Retrieved on 2020-12-04.

⁷² Obinna Johnkennedy Chukwu, "Utilization of Freedom of Information Act among Journalists and Civil Society Organizations in Lagos State" ("PhD. diss.", University of Port Harcourt, Nigeria, 2019), 94-91.

are unacceptable. To this end, it recommended that the Nigerian society must rise up to accord women its pride of place, and concertedly, whittle and/or stop all activities that seek to subordinate or place women in a subordinate position to men.

Nigeria government (Legislature) should, as a matter of urgency amend, repeal and replace all the laws highlighted, inclusive of other obnoxious laws that place women as second fiddle or second-class citizens. Employers of labour, both public and private sectors, at all levels, should apply special measures to promote gender equality.

Further, since education and poverty were identified as some of the mechanisms that reinforce subordination of women or placed women in a subordinate position to men, concerted efforts should be made by governments at all levels to educate the girl-child and women; provide soft loans to women in order to help them start a business or learn a trade; and provide jobs, as these will manifestly, lift women out of the pitiable subordinate position orchestrated by men and the society.

Finally, it is concluded that the role of the media is essential and vital in this regard, particularly, in exposing and dissemination of information pertaining to the mechanisms of subordination of women outlined. To that extent, the media should utilize its potentials to disseminate and expose information bothering on the mechanisms of subordination of women in Nigeria, with a bid to massing public opinion against it, and by extension, ensuring its obliteration.

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STRUCTURE OF BI-TERM MONOMIALS IN ENGLISH FOR AUDIT AND ACCOUNTING

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Abstract: *The given research aims at the analysis and description of the structure of two-component terms in English for Audit and Accounting as a language for specific purposes. Such two-component terms are referred to as bi-term monomials and English for Audit and Accounting plays a role of a selected professional language domain. The theoretical principles of the work provide a brief overview of languages for specific purposes and substantiate the need in introduction of the term, monomial'. The research is based on the findings that a great number of terms / term clusters are strictly set and/or irreversible in their structure, which is why such are addressed as monomials and polynomials rather than terms. The topicality of the research links to bridging the gap between academic findings and applicability of such in the digital solutions for any area in science, technology and business in future. Bi-term monomials are classified and analysed according to their structure and categories, to which the terms in the monomials belong. The material of the study is composed of 115 monomials (terms) selected from the Handbook of International Quality Control, Auditing, Review, Other Assurance, and Related Services Pronouncements validated by the IAASB in 2018.*

Keywords: *English for Audit and Accounting (English for A&A), language for specific purpose (LSP), monomial, bi-term monomial, binomial, polynomial, term.*

Introduction

Terminologists regularly face a good number of issues when dealing with concepts and their designations – terms, names and symbols, in a certain language as well as formulation of principles and methods governing these relations in a subject field (Valeontis & Mantzari 2006, p.1)¹, and the set of terms that belong to the special language of a specific subject field (idem). Some recent studies focus on a revisited question of the relationships between ontologies and terminologies, for example, in

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¹ K. Valeontis; E. Mantzari, The linguistic dimension of terminology: principles and methods of term formation, 1st Athens International Conference on Translation and Interpretation Translation: Between Art and Social Science, 13 -14 October 2006, pp. 1-20.

Bautista-Zambrana² the findings address five aspects analysed to construe the ontology for terminology work: representation of conceptual relationships and their features, another of linguistic relationships, use of abstract concepts, data categories and ontology display (p. 44). Further, Grabar et al.³ explains that “because of the proximity in their semantic content and application contexts, terminologies and ontologies may be better thought of as part of a continuum rather than completely distinct types of artifacts”. Comparison studies (Flóttum and Dahl⁴, Janulevičienė and Rackevičienė⁵) and discourse analyses (Thomas⁶, Hyland⁷, Dragsted⁸) are visible enough in the scholar publications. However, despite the fact that most terminologies in relevant subject fields have been fixed and described, including the formation criteria for the term and term cluster, syntactical patterns may vary from language to language given the language family. Thus, the aim of the paper is to draw attention to the syntactical (bi-term) structure of the English audit and accounting terms presented as monomials in English for Audit and Accounting.

The theoretical principles of the research rest on: (i) overview of languages for specific languages in literature, (ii) substantiation of the introduced term of *monomial*, with a glance at syntactical structures of monomials / polynomials (terms) in English for Audit and Accounting as a language for specific purpose. The novelty of the work is with a somewhat different look at syntactical patterns of the most frequently used bi-term monomials as specified. Research methods and techniques of term sampling, grouping and sub-grouping under the criteria of structural analysis, descriptive analysis, quantitative and qualitative approaches help identify a distinct particularity for certain noticeable trends in bi-term monomial coinage and use. Combining mixed methods of quantitative,

² M. Bautista-Zambrana, OWL Ontology Use for Terminology Work, *LSP Journal*, Vol.5, No.2, 2014, pp. 44-65.

³ Grabar et al, Ontologies and terminologies: Continuum or dichotomy?, *Applied Ontology*, Vol. 7, 2012, p. 376.

⁴ K. Flóttum, T., Dahl, IPCC communicative practices: A linguistic comparison of the Summary for Policymakers 2007 and 2013, *LSP Journal*, Vol. 5, no 2, 2014, pp. 66-83.

⁵ V. Janulevičienė, S. Rackevičienė, Formation of criminal law terms in English, Lithuanian and Norwegian, *LSP Journal*, Vol. 5, no 1, 2014, pp. 4-20.

⁶ J. Thomas, Discourse in the Market Place: The Making of Meaning in Annual reports, *Journal of Business Communication*, 34 (1), 1997, pp. 47-66.

⁷ K. Hyland, *Disciplinary Discourses*. Longman: Harlow, 2000.

⁸ B. Dragsted, A case study of letters to shareholders in annual reports before, during and after the financial crisis, *LSP Journal*, Vol. 5, no 2, 2014, pp. 84-104.

qualitative, descriptive analyses and discourse approach, the work looks at feasibility of the newly proposed classification of terms / monomials for languages for specific purposes and explains the relevance by exemplifying the core concepts with the study material. The theoretical background lies with revisiting language for specific purpose (LSP) in linguistics, primarily focusing on English for Audit and Accounting, on the one hand. On the other, that results in proposing the classification of English audit and accounting terms in association with the algebraic terms in an algebraic expression in order to avoid tautology (the term, which consists of two or three terms in every and each case). The terms selected from the Handbook of International Quality Control, Auditing, Review, Other Assurance, and Related Services Pronouncements validated by the International Auditing and Assurance Standards Board (IAASB) as of 2018 make the material for the study and Volume I includes the glossary of terms accepted globally by professional communities. For the statistics purposes and just scratching the surface with some linguistic A&A trending in professional reading, no other sources but the glossary (further in the text referred to as the Standards), have been used.

Languages for specific purposes

Language for Specific Purposes (LSP) since its inception in 1970-ies has always been vastly discussed among recognised scholars and researchers. Looking back, with LSP one may follow descriptive textual tradition shifting from time to time from language to discourse to genre as exemplified in the subject journal *English for Specific Purposes*. Next, LSP deals with massive amount of new data and information now digitally available, thus, making it possible to design new approaches to understanding professional discourse, competing models, global integration of economies and linguistic globalisation, language acquisition and instruction, methodology and distinct differentiation between language for general purposes and language for specific purposes. Consequently, the former breaks into primary, secondary and adult tertiary whereas the latter includes (a) language for science, (b) language for business and economics, and (c) language for social sciences. Subsequently, each from language for science, business and economics, and social sciences sub-breaks into language for academic purposes and language for occupational purposes. Such approach had been widely

adopted by many world LSP practitioners after Hutchinson and Watters⁹ introduced such tree model of English for specific purposes in 1987. Broadly speaking, the analysis of the literature displays a highly variable status of LSP as a discipline and a profession in different parts of the world. Following Chaika¹⁰ in *Language for Specific Purposes: Ukrainian Legal Terms of Obligation*, “a lot of [other] scholars view LSP as an umbrella term which shelters diverse teaching contexts and particularise ESP - English for specific purposes, as opposed to English for general purposes, where the latter breaks down into English for Academic Purposes (EAP) “involving pre-experience, simultaneous / in-service and post-experience courses”, and English for Occupational Purposes (EOP) for study in a specific discipline (pre-study, in-study, post-study) or as a school subject (independent or integrated)”. Next, citing Milevica Bojović¹¹, Chaika (ibid.) notes that such subdivision is not finite. Further break-down provides more detail as narrows into more specificity in respective fields, i.e. EAP for Science and Technology becomes EST, EAP for Medical Purposes turns into EMP, English for (Academic) Legal Purposes is known as ELP, etc.

Overall, most LSP studies mainly concern either professional discourse or language teaching and relevant methodology. Combing through international conference proceedings, symposia, publications and research focus, the recent decade has witnessed an uprising trend in considering LSP a foreign language instruction or response to business needs in the domestic and global markets as “distinguished scholars view languages for specific purposes as language instruction rather than a branch of applied linguistics”, according to Chaika and Zakatei¹². In the end, it is worth mentioning some findings from the final considerations by John Swales¹³ in *Languages for Specific Purposes* that “LSP has a number of structural problems such as weaknesses in institutional recognition and

⁹ T. Hutchinson; A. Waters, *English for Specific Purposes: a Learning-centered Approach*, Cambridge: CUP, 1987.

¹⁰ O. Chaika, Language for specific purposes: Ukrainian legal terms of obligation. *Vostochnoslavijskie jazyki i literatura v yevropejskom kontekste*, V, 2018, pp. 51-59.

¹¹ M. Bojović, Teaching Foreign Language for Specific Purposes: Teacher Development. *Association of Teacher Education in Europe*. 31st Annual Conference, 2015.

¹² O. Chaika, Yu., Zakatei, Monomials in English for Law, *International Journal of Philology*, Vol. 2 (14), 2019, pp. 114-121.

¹³ J. Swales, Languages for Specific Purposes, *Annual Review of Applied Linguistics*, 20, 2000, pp. 59-76.

uncertain provision of professional training”. On top to that, *ibid.* “although LSP has, in *English for Specific Purposes*, a flagship journal, regular attempts to get it included in the Social Science Citation Index have always failed”. The afore-mentioned seems to have no adverse impact on the global researchers in the field irrespective of its variability.

Monomial vs term

English for Audit and Accounting (English for A&A) stands out among other languages for specific purposes. Through years, a great number of works in the relevant fields have been published across geographies, roughly speaking, with the emphasis on the two criteria. One may link with English for Law, English for Finance, English for Business, English for Management and the like, thus, representing English for Academic Purposes (EAP) or English for Occupational Purposes (EOP), in particular. Another is similar to the specified, however, shifting to other languages, e.g. Spanish for Law, Spanish for Finance, Portuguese for Law, Portuguese for Finance, Ukrainian for Law, Ukrainian for Finance, etc. At the same time, domestic researches in terminology, terminography and translation studies as well as innumerate sources on investigation of the term and its properties evidence profound study in the fields and good heritage of scholar findings. However, the theoretical view on the issues, even revisited, may hardly produce a meaningful impact on the academia. Thus, it may sound bold enough but it is crucial to draw your attention to the recently introduced idea¹⁴ of considering another linguistic term used in languages for specific purposes to substitute a conventionally used *term*, especially under a circumstance of relevant term structure where it is either two-component, three-component and/or poly-component. The author (*idem.*) advances two underlying reasons for that:

- (i) To avoid confusion (tautology of terms) with the analysis and description of the term structure in English for Audit and Accounting, on the one hand, and on the other, to meet the standards and conventional approaches for term study in linguistics unless contradictory,
- (ii) To enable data mining and AI (Artificial Intelligence) experts to design, develop and implement “possible solutions to [...] technical framework for bilingual and

¹⁴ O. Chaika, Monomial Variables in English Audit Terminology, *International Journal of Philology*, Vol. 10, no 1, 2019, pp. 100-108.

multilingual concordances in corpus based linguistics” (ibid.).

It may also advance machine translation and text recognition, help to save resources regardless of origin – human, time, financial, etc., increase efficiency in performance and so on.

One-word terms and multi-word terms are the focus of study for many researchers. According to the chapter on the term in the *Philosophical Encyclopaedic Dictionary*¹⁵, term (Lat. *terminus* ‘border, boundary, ending’) means a word or phrase to convey a concept attributable to it in a specific field of knowledge in the way as accurate as possible in its definition. The *Comprehensive Dictionary of the Ukrainian Language*¹⁶ broadens the definition of a term as specified above with a particular mention of specific fields of knowledge – science, technologies, art, social and public life, etc. The online *Merriam-Webster Dictionary* defines term as a word or expression that has a precise meaning in some uses or is peculiar to a science, art, profession, or subject. The *Cambridge Dictionary* [online] in the definition of the term underlines register rather precision of concept, i.e. a word or expression used in relation to a particular subject, often to describe something official or technical. A variety of term definitions may be found not only in the dictionaries and encyclopaedias, but also in publications of works by recognised scholars and even young researchers. That altogether results in a lot of ways to classify terms. For example, some terms are grouped according to their origin – native words or borrowings, direct or adapted or loan translations. The other way to classify terms can be according to the timeline – historic and neologisms. Very often the terms are analysed by terminologists according to their structure (simple and complex), according to their formation (semantic change, morphological change, borrowing, conversion), or the category to which terms belong (nouns, adjectives, etc.).

Largely, it is not argued what are the basic properties of the term. Moreover, the research carries on to facilitation of knowledge with computer-assisted language learning applications (CALLs), for teaching and learning languages for specific purposes in association with language

¹⁵ A. Ishmuratov, Term, in *Philosophical Encyclopaedic Dictionary* / Ed. by V. Shynkaruk, Kyiv: Abrys, 2002, pp. 636-742. ISBN 966-531-128-X.

¹⁶ V. Busel, Term, in *Comprehensive Dictionary of the Ukrainian Language* / Ed. by V. Busel, 5th Edition, Kyiv; Irpin: Perun, 2005. ISBN 966-569-013-2.

instruction and acquisition, and application of innovative approaches to cross-disciplinary study in the digital era. Information technology is playing a leading role today in almost every other area of life, business and science. Voice and message recognition, text recognition in working papers (A&A) and documents, automated samplings of the required data are the present realia. Clearly enough, information technology helps store, process, transmit, retrieve and manipulate vast data of information. The term as introduced by Harold J. Leavitt and Thomas L. Whistler¹⁷ included three categories that have remained of high value today. They are techniques for processing data, application of statistical and mathematical methods [to decision making] and simulation of higher-order thinking with the help of relevant software. Thus, with synchronizing the algorithmic IT architectures and formal structures with those in the linguistic domains, the results may exceed the expected outcome. It is supposed to become possible as IT and linguistics may share the research methods and data.

For the engineering and data mining purposes, linguists may be invited to differentiate the term and the monomial in a specialised field of knowledge, linguistically speaking, in LSP. Considering mathematical methods in IT, algebraic expressions, in particular, it is known that the latter consist of terms. To put it plain, a term in algebra is either a single number or variable, or numbers and variables multiplied. In an expression, terms are separated by a '+' or '-', sometimes divided. Surprisingly, in terminologies / LSPs, a term is also expressed by either a single number or variable(s) since it is one-word or multi-word phrase. Further, there are terms, which make pairs / groups of words used together in the strictly set order. In linguistics and stylistics, they are known as idioms, collocations, set expressions, freezes, binomial pairs¹⁸. For example, in law please follow *last will **and** testament*, *law **and** order*, in corporate routines - *business **or** pleasure*, *sooner **or** later*, *two **or** more*, correspondingly. From a linguistic understanding, the terms in each term possess some distinct properties. They most times:

- (i) Belong to the same part of speech,
- (ii) Have some semantic relationship,
- (iii) Usually connect with the conjunction(s) *and/but*.

¹⁷ H. Leavitt, T. Whistler, Management in the 1980s, *Harvard Business Review*, 1958.

¹⁸ Y. Malkiel, Studies in Irreversible Binomials, *Lingua*, 8, pp. 113-160.

Similarly, as in the classification of terms specified above, such terms consisting of terms are also classified according to their structure, formation, etc. Therefore, the challenging job is to describe and analyse terms in a term, especially under a circumstance that it is not occasional. Consequently, multi-term terms may display permanent trending: (a) multi-term term that includes the constant term and a variable, e.g. in A&A *an independent auditor, an internal auditor, an external auditor*, and (b) multi-term term in which terms connect with a conjunction, e.g. *a true and fair view*. The former examples, all three, include *auditor* as the constant term in the term, the terms *independent, internal* and *external* are variables of the term. Subsequently, in A&A the term *true and fair view* consists of three terms. These terms are deemed inseparable and irreversible at the same time. The term consists of two bi-term terms *true view* and *fair view*, and each also sub-breaks into two terms of the term – *true* (a variable term) + *view* (a constant term) and *fair* (a variable term) + *view* (a constant term). Now, even to the extent described and experienced in this paragraph, it is somewhat confusing to follow “terms” in “a term”.

Therefore, in order to avoid confusion with the linguistic term structure in terminologies / LSP, analysis and description of terms in English for A&A and conventional approaches in linguistics, a suggestion has been made to consider and test the linguistic substitute for the whole term. It is proposed to consider the term of *a monomial / a polynomial* instead. These two may be viewed as a linguistic term substitute for the entire LSP term, similarly to an algebraic expression. A monomial may refer to any term regardless of its structure save for the terms that include more terms grouped or connected with each other with conjunctions *and* and *or*. For the latter, it may be found appropriate to use the term of polynomial. The reason for a polynomial is that according to its structure, the specific term includes two phrases of the term, or three, or more complicated term structures, respectively. Thus, such polynomial may break into a binomial, trinomial or polynomial as it is.

Such substitution and/or innovative approach may be relevant and necessary for contemporary linguistics, especially for the studies about terminologies, or languages for specific purposes. The idea underpins the integrity of the term, designation and concept provided that under the research *a term* refers to and means *a component of the term* in the term structure. Terminologies evidence a great number of terms similar in their structure to an A&A term *quality control management system*. It is clear that it is a complex term that consists of compound nouns in its structure. At

the same time, separate terms of the term may also function independently as terms. In the digital era, there is no sense to waste resources to integrate / disintegrate the terms of the term inasmuch machines can perform much faster and more efficiently. This drives a reason for the proposed substitution, which rests on linguistic simplification and transparency to avoid tautologies for a term and/or a number of terms (components / elements) that may form a term as it is exemplified above.

Monomials in English for Audit and Accounting

Given the specified above and following Chaika¹⁹ on the definition of the monomial, “monomial terminological set expression in English for Audit (a monomial in audit terminology, or a monomial term, or a monomial) means only one term, which can be extended with a modifier / modifiers or unextended”. That underlines that a monomial in English for A&A includes at least one constant term. The other terms in the monomial, if any, express a modifying role and extend the monomial. They are referred to as monomial variables. Moreover, of crucial value is understanding that despite the fact a monomial can be expressed in a single term, it is much more important to focus on monomials that are bi-term, three-term, four-term, etc. including some syntactical patterns of a monomial term, which can be modified by a relative defining or non-defining clause, participle clauses, in particular. For instance, the glossary of terms²⁰ specifies such monomial as *those charged with governance*. Further, the glossary includes a two-tier monomial extended as modified by a binomial: *premise, relating to the responsibilities of management **and**, where appropriate, those charged with governance, on which an audit is conducted*. However, the latter should not be confused with a binomial²¹ or a bi-term monomial. The bi-term monomial is a monomial that contains two terms, one of which is a constant term and the other is a variable.

The material studied clearly demonstrates that all the monomials selected from the glossary of terms break into three main groups: (a) mono-term monomials (a single term makes a monomial), (b) bi-term monomials,

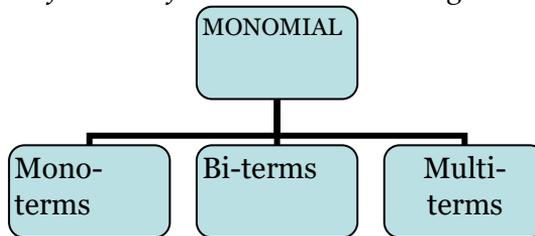
¹⁹ O. Chaika, Monomial Variables in English Audit Terminology, *International Journal of Philology*, Vol. 10, no 1, 2019, p. 104.

²⁰ *Handbook of International Quality Control, Auditing, Review, Other Assurance, and Related Services Pronouncements*, Vol. I, 2017, p. 29.

²¹ O. Chaika, Binomials in English Audit Terminology. *International Journal of Philology*, 2019, Vol. 3, Kyiv, NUBIP, pp. 68-73.

and (c) multi-term monomials, which may consist of three terms, four terms, etc. Fig. 1 presents the classification of monomials in English for A&A according to their structure. No other category has been identified in the glossary. The pronouncements of the International Auditing and Assurance Standards Board in the body of the standards include even five-term monomials but they are beyond the scope of the present work and will be discussed with further study and analysis of the project.

Fig. 1. Classification of monomials according to the structure



To make a clearer picture and before moving to the analysis and description of the bi-term monomials in more detail, Fig. 2 lays out a few examples of monomials in English for A&A.

Fig. 2. Syntactical patterns of monomials in English for A&A

MONOMIAL			
Mono-terms	Bi-terms	Three-terms	Four-terms
<i>Anomaly</i> 'a misstatement or deviation that is demonstrably not representative of misstatements or deviations in a population'	<i>Applicable criteria</i> 'the criteria used by the entity to quantify and report its emissions in the GHG statement'	<i>Arm's length transaction</i> 'a transaction conducted on such terms and conditions as between a willing buyer and a willing seller who are unrelated and are acting independently of each other and pursuing their own best interests'	<i>Complementary user entity controls</i> 'controls that the service organization assumes, in the design of its service, will be implemented by user entities, and which, if necessary to achieve control objectives, are identified in the description of its system'
Expertise 'skills, knowledge and experience in a particular field'	<i>Applied criteria</i> 'the criteria applied by management in the preparation of the summary financial statements'	<i>Assurance engagement risk</i> 'the risk that the practitioner expresses an	<i>Date of approval of the financial statements</i> 'the date on which all the statements that comprise the financial statements, including

		inappropriate conclusion when the subject matter information is materially misstated'	the related notes, have been prepared and those with the recognised authority have asserted that they have taken responsibility for those financial statements'
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It should be noted that the monomials analysed as selected from the glossary are also used across the International Standards on Auditing, e.g. ISA 700, *Forming an Opinion and Reporting on Financial Statements*, ISA 805, *Special Considerations – Audits of Single Financial Statements and Specific Elements, Accounts or Items of a Financial Statement*, etc.

Bi-term monomials in English for Audit and Accounting

Bi-term monomials are monomials that consist of two non-zero terms and by structure are determined as extended. One term is the constant term and the other is its variable. It is critical to note that in most cases the constant term coincides with the key term in the grammar pattern (Fig. 4) but for professional communities there are monomials in which the modifying term plays a leading role (Fig. 5).

The material analysed allows for the below classification of the bi-term monomials in English for A&A according to their structure and categories to which the monomial terms belong.

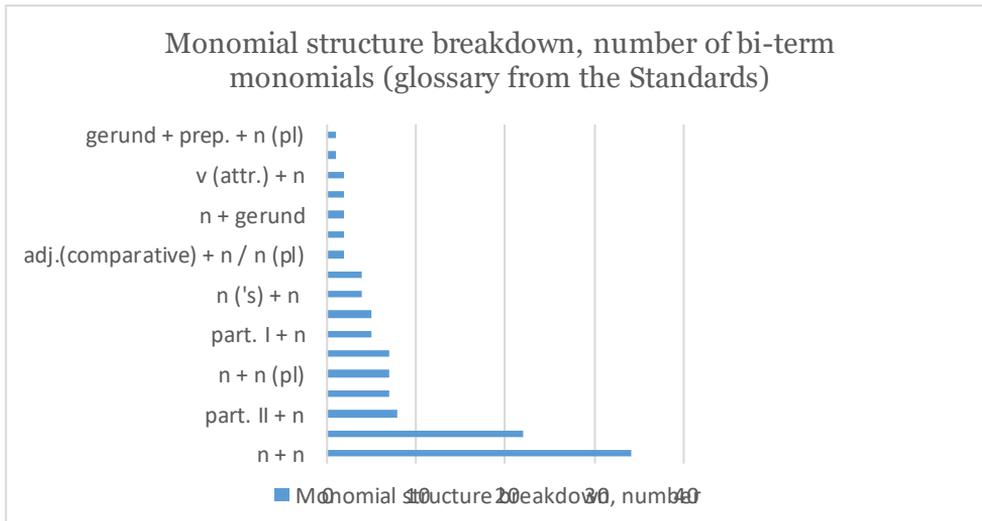
- (a) An adjective + a noun (singular): *direct assistance, responsible party, internal control, reasonable assurance, public sector, supplementary information, tolerable misstatement, environmental risk, significant risk, significant component, significant facility, external confirmation, corporate governance, organizational boundary, inclusive method, inherent risk, comparative information, professional judgment, professional accountant, professional scepticism, substantive procedure, annual report;*
- (b) An adjective + a noun in plural: *internal auditors, analytical procedures, financial statements, group-wide controls, applicable criteria, subsequent events, professional standards;*
- (c) An adjective used in the comparative degree + a noun / an adjective used in the comparative degree + a noun in plural: *smaller entity, further procedures;*

- (d) A pronoun + a noun: *other information*;
- (e) A noun + a noun: *group audit, component auditor, predecessor auditor, user auditor, user entity, service auditor, network firm, business risk, audit documentation, audit risk, audit file, audit evidence, base year, engagement documentation, engagement team, assurance engagement, review engagement, compilation engagement, quality control, subservice organization, compliance framework, engagement risk, control risk, detection risk, engagement letter, estimation uncertainty, service organization, engagement partner, control environment, performance materiality, component materiality, group management, component management, control objective*;
- (f) A noun (abbreviation) + a noun: *GHG statement, IT environment*;
- (g) A noun + a noun (plural) / [preposition] + a noun + a noun in plural: *control activities, access controls, engagement circumstances, greenhouse gases, review procedures, management bias, pro forma adjustments*;
- (h) A noun in the possessive case + a noun: *auditor's range, auditor's expert, management's expert, practitioner's expert*;
- (i) A noun + a gerund: *audit sampling, statistical sampling*;
- (j) A noun + a preposition + a noun / a noun (plural) + a preposition + a noun / a noun (plural) + a preposition + a noun (plural): *type of emission, misstatement of fact, date of report, misappropriation of assets, scope of a review, preconditions for an audit, tests of controls*;
- (k) A gerund + a preposition + a noun in plural: *monitoring of controls*;
- (l) Participle I + a noun: *sampling unit, sampling risk, accounting climate, non-sampling risk, engaging party*;
- (m) Participle I + a noun in plural: *accounting records, corresponding figures, opening balances, closing balances*;
- (n) Participle II + a noun: *experienced auditor, modified opinion, unmodified opinion, limited assurance, written representation, related party, listed entity, purchased offset*;
- (o) Participle II + a noun in plural: *intended users, agreed-upon procedures, applied criteria, uncorrected misstatements, related services*;

- (p) A noun in plural + a noun: emissions deduction, emissions factor;
- (q) A verb as an attribute + a noun: *carve-out method*, *walk-through test*.

As provided in the classification and Fig. 3 to this work, the largest group of bi-term monomials is the monomials that consist of the two noun terms. This group is made of 34 bi-term monomials, which makes 29.5% of the total number (the glossary only). The next group includes 22 monomials, which is 19% of the total. The other groups, in particular, fall approximately four or six times smaller, which is very visible. For instance, the group that enlists bi-term monomials expressed by Participle II + a noun includes 8 monomials, which is 7% of the total. The other 6% is the same value for the bi-term monomials expressed by the noun as the constant term with the three groups: a noun in singular / plural + preposition + a noun in singular / plural; a noun + a noun in plural; an adjective + a noun in plural. The remaining groups feature 4.4% for the groups that present the structures of Participle I + a noun, and Participle II + a noun in plural. Also, 3.5% for the two groups - a noun in the possessive case + a noun, and Participle I + a noun in plural can be less demonstrative than the afore mentioned but in practice such monomials are often used by professional people in everyday business communication. What should be summarised next is 1.7% of the same value for 5 groups and 0.9% of the same value for 2 groups, correspondingly. The least used syntactic forms of the bi-term monomials refer to the structures of a pronoun and a noun as categories of the monomial terms and a gterund and a noun, respectively.

Fig. 3. Monomial structure breakdown (bi-terms only)



As selected and analysed, the bi-term monomials (from the Standards) are in their absolute majority – 115 bi-terms, of nominative nature. The composition may vary. However, the constant term in the monomial is generally expressed by a noun. The classification includes another group, in which the constant term is expressed by a gerund (this group enlists just one bi-term monomial) – *monitoring of controls*.

All the 17 syntactic patterns of the bi-term monomials form 17 groups according to the structure of the monomials and the category the terms belong to. Besides, another criterion is frequency usage of the pattern for the coinage of a bi-term monomial. With cases in which the frequency ratio is below 5%, the main focus shifts to the other groups with a higher frequency ratio. In the end, there are nine distinct groups of the bi-term monomials (Fig. 3).

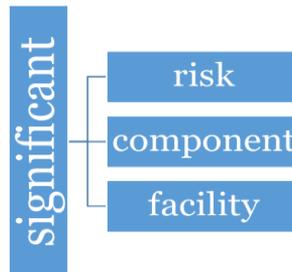
What should be noted as well is the relevance of the constant term in the bi-term monomial. Fig. 4 *Constant Term and Monomial Variables* below addresses the three bi-term monomials: *environmental risk*, *significant risk* and *inherent risk*. The constant term is *risk* whereas *environmental*, *significant* and *inherent* are monomial variables in the bi-term structure.

Fig. 4 Constant Term and Monomial Variables

RISK		
environmental	significant	inherent

Next, sometimes it is important to consider first the modifying term in the bi-term structure as it is the variable along with the constant term rather than the constant term along with the variable, which makes it into a fixed monomial as opposed to terms in linguistics and the difference between the word and the term. Fig. 5 sets out three bi-term monomials but in the different lay-out: *significant risk*, *significant component*, *significant facility*. Such model underlines the leading function of the modifying term in the bi-term structure as interpreted by the professional community.

Fig. 5. The bi-term structure (modifying term+ constant term)



Conclusions

The main findings as to the structure of bi-term monomials (the total of 115 bi-term monomials from the Standards) in English for A&A introduce nine distinct groups. The opening group is represented by a set cluster of a noun term (either in singular or plural) modified by an adjective term (19% of the total number of the bi-term monomials): *financial statements*, *an independent auditor*, *reasonable assurance*. The next group (29.5% of the total number) views a large and ever increasing number of monomials of compound nominal nature, featuring a noun modified by another noun: *a network firm*, *business risk*, *Management Letter*, *audit documentation*, *audit risk*, etc. Further, we come to two more groups, where the bi-term monomial is strictly set as the compound noun (N + N) - the constant term is a noun in plural (6%), e.g. *control activities*, *access*

controls, *Management bias*, etc. whereas the other group (1.7%) views the compound noun that sub-breaks into a modifying abbreviation and a noun, e.g. *GHG statement*, *IT environment*. Group 5 gathers bi-term monomials encoded as (i) a noun + a preposition + [article] a noun, (ii) a noun in plural + a preposition + [article] a noun, and (iii) a noun in plural + a preposition + a noun in plural (6%): *misstatement of fact*, *date of report*, *misappropriation of assets*, *scope of a review*, *preconditions for an audit*, *tests of controls*. Groups 6 and 7 identify a gerundial nature in the bi-term monomial, either in the constant term or in a modifying monomial variable: *monitoring of controls* (such constitute 0.9%) as opposed to *audit sampling*, *statistical sampling*, etc. (4.4%), respectively. Groups 8 and 9 feature bi-term monomials composed of the noun modified by the participle, i.e. Participle I and Participle II: *accounting records*, *closing balances*, and *experienced auditor*, *limited assurance*, *written representations*, etc. The quantitative value of the bi-term monomials in which terms are expressed by present or past participles varies given the form of the constant term in the monomial structure – singular or plural.

Of special status are some more groups, however, represented by a much smaller number of bi-term monomials, for instance, the coined clusters of the terms expressed by a noun and a modifying phrasal verb in pre-position to the noun: *a carve-out method*, *a walk-through test*. The topicality of the research looks into the future simplified digital data processing, text mining and artificial intelligence (AI) including machine-learning technologies that can be developed with the shared input by IT engineers and linguists.

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