Konferences zinātniskā komiteja. Scientific committee of the conference

MŪSDIENU UZŅĒMĒJDARBĪBA, VADĪBA UN INOVĀCIJAS / CONTEMPORARY ENTREPRENEURSHIP, MANAGEMENT AND INNOVATION

TŪRISMA UN ATPŪTAS ORGANIZĀCIJA / TOURISM AND RECREATION ORGANISATION

THE EUROPEAN UNION AND EUROPEAN VALUES / EIROPAS SAVIENĪBA UN EIROPAS VĒRTĪBAS

EKONOMIKA, FINANSES UN GRĀMATVEDĪBA / ECONOMICS, FINANCE AND ACCOUNTING

TIESĪBU ZINĀTNES AKTUĀLĀS PROBLĒMAS / TOPICAL PROBLEMS OF LEGAL SCIENCE

MŪSDIENU SOCIĀLĀ PSIHOLOĢIJA: TEORIJA UN PRAKSE / MODERN SOCIAL PSYCHOLOGY: THEORY AND PRACTICE

MŪSDIENU UZŅĒMĒJDARBĪBA, VADĪBA UN INOVĀCIJAS

CONTEMPORARY ENTREPRENEURSHIP, MANAGEMENT AND INNOVATION

STRATEGIC DEVELOPMENT OF HOTEL MARKETING BASED ON MARKET POSITIONING: A CASE STUDY OF SIA "SEMARAH HOTEL MANAGEMENT"

Maryia Belova
Latvia
Baltic International Academy
Master, Business Management and Administration
tsygankova.67@inbox.lv
Scientific supervisor:
Dr.oec., assist.prof. Jekaterina Voznuka

ABSTRACT

This article analyzes the marketing strategies employed by SIA «Semarah Hotel Management», a prominent hotel management company in Latvia. It explores customer segmentation, competitor benchmarking, financial indicators, and identifies strategic goals and intensive growth directions. The study integrates theoretical models and practical recommendations tailored to the hospitality industry. The study provides recommendations for adapting and developing an effective marketing strategy tailored to specific market segments and business objectives.

Keywords: Hotel Marketing, Financial Analysis, Economic Activities, Strategic Planning, Semarah Hotel Management

ANOTĀCIJA

Šajā rakstā tiek analizētas mārketinga stratēģijas, ko izmanto SIA "Semarah Hotel Management" — viens no nozīmīgākajiem viesnīcu pārvaldības uzņēmumiem Latvijā. Pētījumā aplūkota klientu segmentācija, konkurentu salīdzinošā analīze, finanšu rādītāji, kā arī noteikti stratēģiskie mērķi un intensīvas izaugsmes virzieni. Tajā integrēti teorētiskie modeļi un praktiski ieteikumi, kas pielāgoti viesmīlības nozarei. Rakstā sniegti ieteikumi efektīvas mārketinga stratēģijas pielāgošanai un izstrādei, ņemot vērā konkrētus tirgus segmentus un uzņēmuma biznesa mērķus.

Atslēgvārdi: Viesnīcu mārketings, Finanšu analīze, Ekonomiskā darbība, Stratēģiskā plānošana, Semarah Hotel Management

INTRODUCTION

The dynamic nature of the Latvian and global hotel industry demands continuous adaptation and strategic planning. Hotels face challenges such as high competition, seasonal demand fluctuations, and evolving consumer preferences. Strategic marketing has become essential for maintaining competitiveness and profitability in this context. This study examines the financial and economic activities of SIA «Semarah Hotel Management», aiming to identify effective marketing strategies and propose improvements based on empirical analysis. The study uses the following methods: literature review, analytical methods including SWOT, PEST and Porter's five forces to assess the internal and external factors influencing the company's strategic decisions.

BASIC THEORETICAL AND PRACTICAL PROVISION

The study presents a comprehensive examination of the theoretical foundations required to formulate marketing strategies in the context of the hotel industry. The hotel industry is characterized by unique features, including the inseparability of production and consumption of services, high variability of demand, and intense competition. These factors require a strategic

marketing approach that is both flexible and customer-oriented. Key theoretical models discussed include Kotler's marketing mix framework[1] and Porter's competitive strategies[2], highlighting the importance of segmentation, targeting, and positioning (STP) as fundamental to strategic marketing. The study examines various marketing strategies applicable to the hotel sector, such as differentiation, concentration, and digital marketing strategies. The research concluded that effective hotel marketing strategies must integrate both traditional and digital methods, focusing on personalized customer experiences and the utilization of modern digital tools for promotion and customer engagement.

The practical part of the study is devoted to a comprehensive analysis of the market environment and competitive positioning of SIA 'Semarah Hotel Management'. The analysis used a number of strategic tools, including SWOT[3], PEST[4] and Porter's five forces[5], to assess both external and internal factors affecting the company's performance.

To assess the competitive environment of the company SIA 'Semarah Hotel Management', which includes the Hotels Lielupe, Metropole, Grand Poet, the Porter model is used.

The assessment results revealed that Hotel Lielupe: market penetration by newcomers is average, the strength of rivalry between existing competitors in the market is high, bargaining power of buyers in the local market is high, bargaining power of suppliers is average, the threat of substitute products is high. The assessment results revealed that Hotel Metropole: market penetration by newcomers is high, the strength of rivalry between existing competitors in the market is high, bargaining power of buyers in the local market is average, bargaining power of suppliers is average, the threat of substitute products is average. Based on the results of the assessment, it was revealed that the Grand Poet Hotel: market penetration by newcomers is low, the strength of rivalry between existing competitors in the market is average, bargaining power of buyers in the local market is average, bargaining power of suppliers is high, the threat of substitute products is low.

After evaluating the competitive victory, the company's main competition should be identified. As a result of the analysis, it was established in the hotel services market: competitors of the Lielupe Hotel are Baltic Beach, Jurmala Spa; competitors of the Metropole Hotel are the Wellton hotel chain, Avalon Hotel; competitors of the Grand Poet Hotel are Kempinski, Pullman.

The main categories of hotel services clients in the local market are: Lielupe Hotel - families with children, middle-aged tourists (45-65 years), corporate clients (off-season); Metropole Hotel - business tourists, individual tourists (solo travelers) and couples, senior tourists (55+), groups of tourists through tour operators; Grand Poet Hotel - premium tourists (luxury segment), young couples and individual travelers (experience seekers), business guests and event participants (MICE segment).

As a result of the study of the financial and economic indicators of the company "SIA 'Semarah Hotel Management'" the following were determined. According to financial and economic indicators, the company's revenue increased from €12,712,772 in 2022 to €16,617,610 in 2023. Such significant growth indicates positive dynamics of operating activities, stable demand and competitiveness of the hotels managed by the company. Expenses were effective and controlled. Despite the decrease in assets, financial stability does not raise concerns, as this may be the result of management decisions aimed at optimization.

To identify the strengths and weaknesses of the company and explore opportunities for further development, a microenvironment analysis (SWOT) was conducted for the hotels Lielupe, Metropole, and Grand Poet, while a macroenvironment analysis (PEST) was carried out for the company as a whole. According to the results of the PEST analysis, it was found that factors such as stable political, government initiatives in tourism, growth of the latvian economy, growth of domestic tourism, development of digital technologies, automation of processes, have a positive

impact on the hotel services market. Currency fluctuations and changing traveler preferences have a negative impact on the hotel services market.

The SWOT analysis revealed that Lielupe Hotel, Strengths indicate that the hotel benefits significantly from its unique location next to the beach and pine forest, modern infrastructure, family-oriented services and professional staff. Its most notable advantage is the largest conference centre in Jurmala. Weaknesses show that the hotel faces challenges related to perceived value for money, especially considering its 4-star status. Identified opportunities highlight areas for growth, such as developing medical tourism to attract year-round clientele and improving digital services to enhance guest convenience. The main threats, seasonality of demand and increasing competition, personnel issues, including the difficulty of attracting and retaining qualified personnel.

SWOT analysis of Metropole Hotel shows that Strengths reflect the hotel's competitive advantage in terms of location, the historical value of the building, positive reviews about cleanliness and service, belonging to the Semarah Hotels chain, the presence of a restaurant and a conference room. Weaknesses indicate that the hotel lacks some modern amenities such as a spa. The historical status of the building limits renovation and expansion. Seasonality, the hotel experiences lower occupancy outside the peak summer period. Opportunities for growth lie in focusing on domestic tourism, focusing on attracting business tourists through partnerships with local companies, increasing online presence. However, threats such as competition from international chains (such as Radisson and Hilton) and problems with staffing may affect the quality of service and guest satisfaction.

SWOT analysis of the Grand Poet Hotel, the hotel's main strengths are its exceptional location in the historical center of Riga, the 5-star standard of hotel service, designer interiors and comprehensive infrastructure (including a spa, fitness center and conference rooms), unique image, high ratings on international platforms. The hotel's weaknesses are related to its relatively high cost of accommodation, the hotel's dependence on international tourism and high-profile business events, the limited number of rooms (168). There are opportunities to diversify the hotel's offering, in particular by capitalizing on the growing demand for wellness and luxury tourism, strengthening the brand by participating in international hotel exhibitions and forming partnerships with airlines, implementing digital marketing strategies to reach wealthy guests from Europe and Asia. The most alarming threats are the seasonality of demand, the growth of boutique apartments and Airbnb offers, the problem of recruiting and retaining qualified staff.

Analysis of the marketing activities of SIA "Semarah Hotel Management" showed that the company uses the following strategies: digital marketing and online promotion, revenue management and dynamic pricing, positioning and brand management, partnerships and loyalty programs.

The case study concluded that in order to maintain and strengthen its competitive position, SIA 'Semarah Hotel Management' should adopt a dynamic marketing strategy that leverages its strengths, addresses market challenges and meets consumer preferences. Improving digital marketing efforts, expanding loyalty programs and facilitating strategic partnerships are recommended as vital measures to ensure sustainable growth and brand loyalty.

RESEARCH RESULTS AND THEIR EVALUATION

The case study showed that despite its strengths such as strong brand presence and high service quality, the company must actively pursue a growth strategy to maintain its position in the market.

The main strategic direction was to define the diversification of the services offered, especially in the healthcare and luxury segments. The importance of increasing customer engagement through digital platforms and targeted marketing campaigns, especially during off-peak seasons, is

emphasized. Using customer data and rewarding loyalty programs, the company can improve the guest experience and build long-term relationships. In the hotel segment, there is an increasing potential for increased international cooperation through global travel networks and participation in international hospitality forums. Implementing these strategies not only improves brand awareness but also attracts a more popular customer audience.

CONCLUSION

The strategic development of hotel marketing for SIA "Semarah Hotel Management" requires a comprehensive and adaptive approach to maintain its competitive edge within the Latvian hospitality sector. By leveraging its strong brand identity, premium service quality, and strategic location of its properties, the company can capitalize on emerging market opportunities while addressing existing challenges such as seasonality and increasing competition.

The analysis underscores the necessity of integrating both traditional and digital marketing strategies to enhance customer engagement and brand loyalty. Specifically, focusing on service diversification in the wellness and luxury segments, strengthening digital presence, and fostering strategic partnerships are pivotal for sustaining growth. Additionally, implementing data-driven decision-making and expanding loyalty programs will further align the company's offerings with evolving consumer preferences.

By adopting these strategic measures, SIA "Semarah Hotel Management" can reinforce its market position, achieve sustainable development, and continue to deliver exceptional guest experiences in the dynamic hotel industry landscape.

Based on the results of the study, the recommendations for the hospitality industry, especially in the context of SIA 'Semarah Hotel Management', are as follows:

- Service Diversification: expand offerings in wellness and luxury to cater to diverse customer segments;
- Digital Engagement: increase online presence through targeted social media campaigns and interactive booking platforms;
- Loyalty Programs: develop and promote loyalty incentives to encourage repeat visits and customer retention;
- Strategic Partnerships: collaborate with international travel networks to boost visibility and attract new market segments;
- Data-Driven Marketing: utilize guest feedback and market analytics to tailor services and improve customer satisfaction.

By implementing these recommendations, the company can enhance its competitive edge, increase customer satisfaction, and ensure sustainable growth in a dynamic market environment.

REFERENCES

1. Kotler, P., Bowen, T., Makens, J. (2017). Marketing for Hospitality and Tourism.
2. Porter, M. (2008). Competitive Strategy: Techniques for Analyzing Industries and Competitors.
3. Maysak, O. S. (2015). SWOT-analysis: Object, Factors, Strategies.
4. Rugman Alan M., Collinson Simon, Hodgetts Richard M. (2006) " International Business" Paperback
5. Cadiat Anne-Christine , Probert Carly (2015) "Porter's Five Forces. Stay Ahead of the Competition" Primento Digital

INNOVATIVE APPROACHES TO LEISURE SPACE DEVELOPMENT IN REGIONAL CITIES: A CASE OF NAVOI, UZBEKISTAN

Sardor Islamov
Latvia, Riga
Baltic International Academy
Master in Business Administration and Management
SardorIslamov95@gmail.com
Scientific supervisor:
Dr.sc. Viatcheslav Zhilinsky

ANOTĀCIJA

Šis pētījums aplūko inovatīvas atpūtas vietas izveidi Navoi, Uzbekistānā, kas apvieno kultūras ēdināšanas pieredzi ar modernām tehnoloģijām. Atrodoties starp divām lielām tūrisma pilsētām, Samarkandu un Buhāru, Navoi ir stratēģiski izvietota, lai gūtu labumu gan no vietējā pieprasījuma, gan no tūristu plūsmas. Piedāvātais projekts — fusion virtuve, kas piedāvā starptautisko virtuvi, piemēram, suši un rulļus — kalpo kā modelis kultūras bagātinātām, tehnoloģiski integrētām mazajiem uzņēmumiem reģionos. Pētījumā izmantotas kvalitatīvas un kvantitatīvas metodes, tostarp biznesa modelēšana, tirgus analīze un ieviešanas plānošana, izmantojot Ganta diagrammas un WBS struktūru. Projekts saskan ar valsts MVU atbalsta programmu un demonstrē, kā inovācijas un uzņēmējdarbība var veicināt ekonomisko un sociālo attīstību reģionālajās pilsētās.

Atslēgvārdi: Inovācijas, atpūtas bizness, fusion virtuve, Navoi, MVU, tūrisms, Uzbekistāna, uzņēmējdarbība, digitālais dizains

ABSTRACT

This study explores the development of an innovative leisure venue in Navoi, Uzbekistan, designed to merge cultural dining experiences with modern technology. Positioned between two major tourist cities, Samarkand and Bukhara, Navoi is strategically located to benefit from both local demand and tourism flow. The proposed project—a fusion kitchen offering international cuisine such as sushi and rolls—serves as a model for culturally rich, tech-integrated small business ventures in regional areas. The research combines qualitative and quantitative methods and includes business modeling, market analysis, and implementation planning using Gantt chart and WBS structure. The project aligns with the national agenda of SME support and demonstrates how innovation and entrepreneurship can foster economic and social development in regional cities.

Keywords: Entrepreneurship, Fusion Cuisine, Innovation, Leisure Business, Navoi, SME, Tourism, Uzbekistan

IEVADS. INTRODUCTION

Regional cities in Uzbekistan, such as Navoi, are increasingly recognized for their potential to diversify the national economy through innovative leisure and tourism initiatives. Situated between the historic cities of Samarkand and Bukhara, Navoi is strategically positioned to attract both local residents and transit tourists. In 2024, the region welcomed over 420,000 foreign tourists, doubling the previous year's figures, highlighting its growing appeal as a tourist destination.

Despite its rich cultural heritage and strategic location, Navoi's leisure infrastructure remains underdeveloped. The city's unique position offers an opportunity to create innovative leisure spaces that cater to both locals and tourists. This paper investigates the development of a culturally enriched, technology-integrated leisure space in Navoi, focusing on a fusion cuisine restaurant that combines traditional Uzbek hospitality with international culinary trends.

The research aims to address the following objectives:

Assess the market demand for innovative leisure spaces in Navoi.

Develop a comprehensive business model incorporating digital technologies.

Align the project with national strategies for SME development and tourism enhancement.

The proposed establishment seeks to integrate advanced technologies such as 3D modeling and artificial intelligence (AI) to enhance customer experience and operational efficiency. By leveraging these innovations, the project aims to set a precedent for modern leisure spaces in regional cities.

TEORĒTISKAIS UN PRAKTISKAIS IETVARS. THEORETICAL AND PRACTICAL FRAMEWORK

Gastronomic Tourism and Cultural Integration

Gastronomic tourism is emerging as a significant niche market in Uzbekistan, offering opportunities to showcase the country's rich culinary heritage. Navoi's fusion cuisine restaurant aims to blend traditional Uzbek dishes with international flavors, catering to diverse palates and promoting cultural exchange. This approach aligns with global trends where unique food experiences enhance tourist satisfaction and encourage longer stays.

Digital Innovations in Restaurant Design and Operations

The integration of digital technologies in restaurant design and operations has transformed visitor experiences globally. 3D modeling enables precise visualization of restaurant layouts, facilitating efficient space planning and ambiance creation. This technology allows for the simulation of various design elements, ensuring that the final setup aligns with the intended customer experience.

Artificial intelligence (AI) is also playing a pivotal role in modernizing restaurant operations. AI applications range from personalized customer interactions to inventory management and predictive analytics. For instance, AI-driven systems can analyze customer preferences to offer tailored menu recommendations, enhancing customer satisfaction and loyalty.

SME Development and Economic Diversification

Supporting small and medium-sized enterprises (SMEs) is a cornerstone of Uzbekistan's economic strategy. The establishment of innovative leisure businesses in regional cities like Navoi contributes to job creation, skill development, and economic diversification. By aligning with national policies, the proposed project seeks to access government incentives and support structures aimed at fostering entrepreneurship. Notably, Uzbekistan has secured a €23.5 million loan and a €3 million grant from the German Development Bank (KfW) to enhance SME development, reflecting the country's commitment to this sector.

PĒTNIECĪBAS METODOLOĢIJA. RESEARCH METHODOLOGY

A mixed-methods approach was employed to gather comprehensive data for the project:

Market Analysis: Surveys and interviews were conducted with local residents and tourists to assess demand for fusion cuisine and modern leisure spaces.

Business Modeling: The Business Model Canvas framework was utilized to outline key components, including value propositions, customer segments, and revenue streams.

Implementation Planning: Project timelines and resource allocations were detailed using Gantt charts and Work Breakdown Structures (WBS).

PĒTNIECĪBAS REZULTĀTI. RESEARCH FINDINGS

Market Demand and Customer Insights

The market analysis, based on surveys and interviews with 150 participants (including residents of Navoi and transit tourists between Samarkand and Bukhara), revealed a strong and growing demand for diversified leisure options in the city. Specifically:

68% of respondents expressed a desire for international cuisine options, citing limited variety in current offerings.

72% of younger demographics (ages 18–35) indicated interest in tech-enhanced dining experiences such as QR code menus, digital ordering, and themed interiors using immersive design elements.

Tourists valued experiential dining that combines culture with innovation, especially when accompanied by storytelling, visual ambiance, and access to local customs.

This data confirms a clear market gap in Navoi's leisure landscape—namely, the absence of spaces that blend food, culture, and technology.

Business Model Insights

Using the Business Model Canvas framework, the research highlighted how strategic design and partnerships can support a sustainable and innovative restaurant venture. Key findings include:

Value Proposition: The combination of cultural dining and international fusion cuisine with immersive technology—such as 3D-modeled interior designs and AI-assisted menu personalization—offers a distinct and modern experience that differentiates the venue in the local market.

Customer Segments: The primary target audience includes young urban professionals, students, families, and foreign tourists. These groups are more inclined to seek novelty, aesthetics, and convenience in their leisure experiences.

Key Resources: Essential resources include trained culinary staff, digital platform infrastructure, and interior space designed with 3D visualization software.

Revenue Streams: Multiple revenue streams are anticipated, including dine-in services, takeout and delivery options, and hosting of cultural events or cooking workshops.

Implementation Strategy The implementation plan, structured through a Gantt chart and Work Breakdown Structure (WBS), outlines a 12-month timeline encompassing the following phases:

Concept Development (Months 1–2): Finalize the fusion cuisine menu, design themes, and technological integrations.

Location Acquisition and Design (Months 3–4): Secure a suitable location in Navoi and commence interior design using 3D modeling tools.

Staff Recruitment and Training (Months 5–6): Hire culinary and service staff, providing training on both culinary techniques and the use of digital tools.

Technology Integration (Months 7–8): Implement AI-driven systems for customer interaction, inventory management, and personalized services.

Marketing and Promotion (Months 9–10): Launch marketing campaigns targeting local residents and tourists, highlighting the unique fusion of culture and technology.

Soft Opening and Feedback Collection (Month 11): Conduct a soft opening to gather customer feedback and make necessary adjustments.

Grand Opening (Month 12): Officially launch the restaurant, positioning it as a flagship model for innovative leisure spaces in regional cities.

SECINĀJUMI. CONCLUSIONS

The proposed fusion cuisine leisure space in Navoi represents a viable model for integrating cultural heritage with modern technology to enhance regional tourism and economic development. By addressing market demand, leveraging digital innovations, and aligning with national SME strategies, the project has the potential to serve as a catalyst for similar initiatives in other regional cities. The integration of AI and 3D modeling not only enhances customer experience but also streamlines operations, setting a new standard for leisure spaces in Uzbekistan.

Future research could explore the long-term impacts of such ventures on local economies, cultural preservation, and the scalability of tech-integrated leisure spaces in other regions. Additionally, studies could assess customer satisfaction and engagement levels to further refine the business model and service offerings.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. Kapiki, S., & Tarikulov, T. (2014). Gastronomy Tourism as an Emerging Niche Market in Uzbekistan.
2. Ibrokhimov, N. (2024). Digital Innovations Transforming Tourism Experiences in Uzbekistan: A Mixed-Methods Approach. Central Asian Journal of Innovations on Tourism Management and Finance, 5(4), 116-123.
3. Ruziyeva, M. R., & Ziyoviddinov, S. T. (2024). Innovative and Traditional Ways of Developing Gastronomic Tourism in Uzbekistan. Central Asian Journal of Innovations on Tourism Management and Finance.
4. Narzullaeva, U. N., & Khasanova, J. (2022). Digitalization is the Main Factor in the Recovery of Tourism in Uzbekistan. Specialusis Ugdymas.
5. Sabirova, J. (2024). Strategic Measures for Sustainable Tourism and Hospitality Development in Uzbekistan. Central Asian Journal of Innovations on Tourism Management and Finance.
6. Essentials of 3D Design for Fine Dining & Restaurants: What Makes a Restaurant Truly Stand Out? (2025). CAD Crowd. Retrieved from https://www.cadcrowd.com/blog/essentials-of-3d-design-for-fine-dining-restaurants-what-makes-a-restaurant-truly-stand-out/
7. 15 Ways AI is Impacting the Restaurant Industry. (2024). NetSuite. Retrieved from https://www.netsuite.com/portal/resource/articles/business-strategy/ai-in-restaurants.shtmlcadcrowd.comNetSuite
8. Odilovich, R. Z., Bobir qizi, D. M., & Yaxshiboy qizi, U. M. (2023). Gastronomic Tourism as a Factor of Attractiveness of the Tourist Destination of Uzbekistan. *Journal of Marketing and Emerging Economics*, 3(4), 45–49. https://openaccessjournals.eu/index.php/jmee/article/view/2086
9. Uzbekistan State Statistics Agency. (2025). *Tourist arrivals in Uzbekistan hit 8.2 million in 2024*. Retrieved from https://daryo.uz/en/2025/02/03/tourist-arrivals-in-uzbekistan-hit-82mn-in-2024

ISSUES OF USING ARTIFICIAL INTELLIGENCE IN DETECTING NETWORK ATTACKS ON CRITICAL INFRASTRUCTURE OBJECTS

Ruslan Ivasenko,
Lecturer, State University of Intelligent Technologies and Telecommunications, Ukraine

Key Functions of AI in Cyber Defense

AI technologies allow solving many problems at all stages of preparation for attack repulsion, as well as during detection, response, and liquidation of the consequences of an incident. Each application can be attributed to one of three global tasks:
- Reducing the workload of cybersecurity specialists
- Detecting anomalies in the behavior of users, applications, and systems
- Advanced threat detection
- Automation of security systems

Reducing the workload and helping specialists

With the help of AI technologies in security solutions, it is possible to automate routine processes of primary processing of security events and other information that specialists are currently forced to analyze. In addition, chatbots based on LLM can provide operational support to specialists in the decision-making process to counter cyber threats.

Large language models (LLM) are AI systems that can process and generate information in natural language using artificial neural networks pre-trained on large volumes of data.

Anomaly detection and advanced threat detection

In information security, it is necessary to process many different data streams and arrays, in which AI solutions that cope well with processing large volumes of information can look for anomalies - signs of a cyberattack. Such anomalies can be deviations in user or system behavior, atypical phenomena in network traffic and other suspicious events that may indicate, for example, the activity of previously unknown malware.

Automation of security systems

AI-based solutions can automate not only attack detection processes, but also decision-making, response, and incident prevention. The degree of automation can vary: from offering a security specialist a ready-made incident response scenario to the role of a full-fledged autopilot.

AI at every stage of information security

Warning

With the help of artificial intelligence, the defense side can identify, predict and prevent current cyber threats in advance, which means they can get more time to ensure protection and prepare to repel attacks.

Company security analysis

One of the main requirements in the field of ensuring information security of a company is understanding its own infrastructure and the cyber threats that are relevant to it. Solutions with artificial intelligence can help automate the analysis of a company's security. Generative AI assistants allow security specialists to analyze threats and risks for the organization by asking questions in natural language. For example, the Charlotte AI module, developed by CrowdStrike, answers questions, including about the presence of vulnerabilities in the infrastructure, their risk level, optimal actions to improve the organization's protection and cybercriminals potentially targeting the company.

Pentests and attack simulation

AI technologies are already used today to automate individual steps in penetration tests, primarily to find and exploit vulnerabilities. In the study on the use of AI in cyberattacks, we already talked about how AI can provide significant assistance to a pen tester in finding and exploiting vulnerabilities. This thesis is confirmed by both scientific research at various universities and the results of experiments, for example, a specialist managed to detect an XXE vulnerability in a browser using ChatGPT, and in November 2024, he found a zero-day vulnerability in SQLite using an AI solution.

In addition to research, tools with artificial intelligence technologies for automating pentests are being developed or are already in the public domain. Among them are both extensions for the popular BurpSuit tool and separate programs, for example, the XBOW startup appeared in 2024. Its developers have already reported that the effectiveness of their penetration testing tool is comparable to that of a professional pen tester, and during the testing stage, XBOW managed to detect several critical CVE vulnerabilities in real applications. There will gradually be more and more such solutions, which will speed up pentesting, allowing experienced specialists to automate routine actions and manually perform more complex tasks. It is important to note that automated testing tools will not only help white hat hackers, but can also allow cybercriminals to speed up simple attacks. It is necessary today, without waiting for the development of attackers' tools, to proactively protect against attacks that can be automated in the near future. I recommend paying special attention to the vulnerability management process.

Another option for testing the security of companies is to use solutions like BAS (breach and attack simulation). BAS tools and auto-pentests simulate attacks and can potentially use AI technologies for many different subtasks. For example, generative AI can be used to create selections of the most likely passwords for a specific target, analyze text files of the system being tested, and generate a clear report on the results of attack simulations.

OSINT of Current Cyber Threats

AI in OSINT allows you to effectively search, collect and analyze data to predict threats. With the help of AI, you can solve specific problems in identifying current threats, for example, identifying trending vulnerabilities that are the most dangerous and actively exploited by cybercriminals. According to available data, on average, about 24 hours pass from the moment an exploit appears until it is actively exploited, so it is important to identify current vulnerabilities as early as possible and start closing them. By analyzing the activity of vulnerability discussions in open sources, for example, in cybersecurity communities on social networks, you can identify trending vulnerabilities - both new and long-known. Based on the activity of the discussion, you can determine in advance the vulnerabilities that cybercriminals will target in the near future.

In the future, artificial intelligence technologies will allow you to solve more global problems related to collecting information and predictively identifying threats. By collecting data from

various open sources, you can form a potential threat profile of a company, taking into account its infrastructure and suppliers, current motives and capabilities of cybercriminal groups potentially targeting the organization. Automated predictive analysis is not only faster than manual data collection and processing, it can be performed continuously, which means it can quickly provide the company's security service with data on current cyber threats to build an effective plan, prioritize actions, and implement steps in advance to ensure effective cybersecurity.

Code Checking

AI technologies can speed up code checking, vulnerability search, detection of potentially malicious fragments and generation of verification tests. In addition, AI can be used for code reverse engineering, searching for hidden malicious features, for example, in repositories connected to the project. AI can be implemented in both static and dynamic methods of code analysis.

Static analysis is aimed at finding potential problems in program code without executing it, during the development process. With the help of static analysis, vulnerabilities and bugs can be identified at an early stage, which means they can be fixed easier and cheaper. Static analysis tools with AI technologies, such as Snyk, are trained on large volumes of program code and can detect potential problems such as the possibility of SQL injection, XSS vulnerabilities or keys and passwords forgotten in the code. A significant advantage of using AI is that models not only detect vulnerabilities, but also immediately offer the developer options for solving the problem, acting as a second pilot. Dynamic analysis, unlike static analysis, checks code during execution and is used to detect vulnerabilities that can only be identified after the program is launched. The most striking example of the introduction of AI technologies into dynamic analysis is fuzz testing, in which random or incorrect data is fed to the program to check whether the application will fail under such conditions. With the help of AI technologies, it is possible not only to generate input data, but also to expand the code coverage with tests. For example, researchers from Google reported that LLMs built into fuzzing have already allowed them to detect new vulnerabilities. Potentially, AI technologies will automate more and more processes in code testing, which means finding and closing vulnerabilities faster before cybercriminals have time to exploit them. At the same time, it is important to consider the possible negative consequences if developers begin to rely entirely on AI code checking. Gradually, the qualifications of specialists in the field of secure development and code verification will decrease, which may lead to problems in the future: for example, a vulnerability missed by a co-pilot will lead to the release of a vulnerable application. For the greatest efficiency, a tandem of an AI assistant and a specialist is needed; such a scheme will combine the advantages of automated code verification and expert analysis.

Control of confidential data

The ability of artificial intelligence to analyze large volumes of data helps in processing not only technical information, but also company documentation. Documents may contain various types of confidential data, including data distributed across different unstructured fields. Tracking such inclusions of sensitive information by conventional means without AI is very difficult and time-consuming, especially considering the volume of documentation. AI can effectively solve this problem: recognize confidential data in documents regardless of their field, and flexibly adjust the document depending on the access level of the employee opening it and the task. For example, retouch part of the personal data of a company employee when the document is opened by an accountant, or replace it with anonymized information that retains all the properties of the original if the document needs to be processed by an external service or used to train another model. Filtering and modifying the information provided can potentially help protect against confidential

data leakage, the most common (54%) consequence of cyberattacks on organizations in 2024. It is important to consider that if documents are uniform and confidential data is always contained in one specific field, artificial intelligence will only slow down and complicate the process, which can be organized much more simply. But such an ideal picture is far from always encountered, so the best results can only be achieved by combining classical approaches to data processing (for solving standard situations) with an AI solution (for non-standard cases).

Detection

The most common application of AI in security is the detection of malicious and abnormal activity. Using artificial intelligence technologies, it is possible to effectively analyze large volumes of data; in terms of threat detection, this allows detecting malware in the traffic flow, detecting deviations in user behavior, filtering security events, identifying phishing emails and AI-generated content.

Security event processing

According to Microsoft, Security Operations Center (SOC) teams receive an average of 4,484 alarms per day and spend about 3 hours manually separating real threats from noise. At the same time, it takes about 10 minutes for a SOC employee to process and analyze each event. In such conditions, false positives become a significant problem, which inefficiently spend the efforts and time of specialists, as a result of which they can miss a real attack. False positives occur because some actions by attackers can be disguised as legitimate user activity, especially when cybercriminals use the principle of living off the land, that is, they use only legal tools already installed on the victim's device. Because of this, normal user actions can be identified by the SIEM system's correlation rules as potentially dangerous, and therefore lead to the generation of a false positive. According to the SANS Survey 2024 Incident Response report, 64% of surveyed companies named false positives as the main problem of SOC. The problem of SOC overload can potentially be solved by using artificial intelligence. An AI solution will perform primary sorting of security events, remove likely false positives and highlight incidents that really require attention for a specialist. For example, one of the functions of the BAD (behavioral anomaly detection) ML module is to assess the risk of each security event on a 100-point scale and enrich alerts with additional context, which allows for faster response. A specialist can sort alerts by decreasing risk assessment and immediately start processing the most dangerous events that require immediate attention. The use of AI technologies will significantly, according to IBM, speed up the sorting and processing of security events by two times, which means increasing the overall efficiency of the SOC.

Behavioral analysis

With the help of machine learning technologies, it is possible to create a profile of the normal operation of an object, such as a user, system or network. In this case, a wide variety of parameters can be taken into account depending on the task at hand: traffic generated by the node, a standard set of applications of employees in one position, the energy consumption of the system. Using ML models, it is possible to conduct a constant analysis of behavior, comparing it with the normal operating mode, deviation from which (anomaly) may indicate the actions of a cybercriminal.

Detecting threats in network traffic

With the help of artificial intelligence, network traffic can be analyzed not only to detect behavioral anomalies, but also to detect malware activity and malicious activity in HTTP sessions.

Using HTTP traffic as an example, a machine learning model can be trained on a number of features characteristic of various dangerous content of this traffic. The trained model will analyze these features of HTTP sessions and look for suspicious values in them that may indicate a potential threat. Such an ML solution allows detecting new malware that cannot be determined using expert rules. For example, the model detected several unknown threats even at the testing stage. It is important to note that ML solutions will not replace expert rules in the foreseeable future; models will complement and strengthen network rules, allowing for more efficient detection of even new potential threats.

Another specific example of detecting threats in HTTP traffic is detecting web shells. Web shells are malicious command shells for remote control of a web server that need to be separated from legitimate traffic, and for complete detection, the task must be solved both at the request and at the response. In the first case, you can prevent the web shell from loading, and in the second, detect its activity. ML models that detect web shells are trained on data from open sources and on examples encountered at Standoff cyber battles, which allows not only to increase the completeness of detection (according to our data, by 30% relative to the rule-based approach), but also to detect new web shells. Using machine learning methods, you can detect encrypted communications of malware with the C&C server in network traffic. Malware can encrypt its communication sessions to hide from security tools; some legal applications can use a similar principle to bypass blocking, including the Telegram messenger. Having learned to classify sessions in traffic by an indirect feature, such as statistics of TCP packet lengths in a session, it is possible to accurately separate traffic into malicious and legitimate. This method can be especially effective, since it is difficult for an attacker to change the principles and mechanisms of hiding malware. Therefore, a cybercriminal will have to spend a lot of time and effort on changing the attack tool before the next hacking attempt.

Detection of unknown threats

One of the main advantages of artificial intelligence in cybersecurity is the ability to detect previously unknown threats. Thus, the AI module can identify attacks that are not covered by existing correlation rules. With the help of AI technologies, it is possible to detect the exploitation of zero-day vulnerabilities and the operation of unknown malware by analyzing the emergence of anomalies and potentially dangerous patterns of action.

For example, the behavioral ML module has already demonstrated the ability to detect unknown threats several times; in one of the Standoff cyber battles, the attackers launched malware that created a chain of 100 subprocesses before starting its activity. The ML model noticed this anomaly, while there was no classic signature for its detection in the product. New malware that is still unknown to security systems is almost impossible to detect using static analysis methods, especially since cybercriminals are constantly changing and disguising attacks using, for example, obfuscation of malicious files or sending malware from hacked trusted email addresses. A behavioral analysis solution will still recognize a threat, regardless of its novelty or disguise, and will ensure the company's protection.

Recognition of phishing and unwanted content

Social engineering remains one of the main methods of cybercriminals in 2024; it was used in every second attack on organizations. Moreover, 42% of malware attacks were delivered via phishing emails. Cybercriminals masterfully manipulate victims' emotions to achieve their goals, so employee training alone is not enough to protect against phishing: anyone can make a mistake and not check a malicious email.

One of the potential software methods for protecting against phishing is the use of AI technologies; its potential effectiveness has already been demonstrated by researchers. With the help of AI, it is possible to analyze not only the content, but also a number of contextual features of an email, such as the length or properties of attachments. Potentially, such a system will be able to detect suspicious emails and warn the user at the early stages of implementation, and immediately block dangerous messages when the accuracy threshold required by the company is reached. Artificial intelligence is not only emerging on the defense side; cybercriminals are also seeking to use new technologies in attacks. In our research, we already reported that attackers have achieved the greatest success in implementing AI in social engineering. With the help of generative AI, cybercriminals automate the creation of phishing, content for bots, and actively supplement classic social engineering attacks with deepfakes. Generated content is constantly evolving, and it is becoming increasingly difficult to recognize it with the naked eye. AI recognition of generated content can help, researchers have already demonstrated the potential effectiveness of these technologies, and such solutions are starting to appear on the market. The consent of legal and responsible developers of generative models to embed watermarks into the generated graphic and audio content could potentially facilitate the recognition of generated content, but the problem still remains the text, which cannot be reliably marked yet, and this does not take into account the potential ability of cybercriminals to independently create generative tools aimed at fraud without any frameworks and restrictions. Another potential area of application of AI in content recognition is the detection of dangerous sites. With the help of AI technologies, it is possible to quickly analyze the content of a site page at the moment the user decides to visit it. If unwanted content is detected, access to the site is blocked even before the user finds himself on the page. Based on such a system, it is possible to build protection against phishing, potentially dangerous or undesirable sites for visiting from a corporate device.

Response

Decision support

AI solutions can significantly speed up response by providing context for a detected attack, explaining security system triggers, and advising on priority actions. Such support allows specialists to obtain the necessary data about a security incident much faster, which means they can make a decision more quickly. Solutions that perform this co-pilot function are being developed by both large companies, such as Microsoft, and individual developers.

Today, another promising development path can be identified - training companies' own LLM cybersecurity assistants. Of course, developing an LLM from scratch is a very expensive process that requires the work of highly qualified AI specialists. Instead, organizations can take ready-made open LLMs and conduct fine-tuning (additional training) on their data. An additional significant advantage of such a solution is that all sensitive data remains within the company and is not sent to the LLM developer for processing. If cybercriminals have managed to achieve their cyberattack goals, assistants can potentially help deal with the aftermath of the incident and suggest the best actions to eliminate the damage caused.

Automatic response

AI technologies can be used to build a process for automatic response to incidents. The degree of automation can vary. Automatic response can be trained on specific actions of the defense team during certain types of incidents and then repeat the actions only in a similar, typical situation. For more complex incidents, an AI system can generate a recommended playbook of actions depending on the context of the cybercriminal's actions, the attacked and already captured resources.

The generated playbook will either be adjusted, verified and launched by a specialist, or, at the maximum level of automation and trust in the system, executed without human approval.

Problems of AI in protection

High expectations for the use of artificial intelligence in information security face a number of problems. AI technologies combine enormous potential and significant requirements for the creation of the final solution: scarce and high-quality training data is required, and only highly qualified specialists with certain skills and competencies can create such a product.

Computing power

Working with AI solutions requires significant computing power, which may be unavailable to small and medium-sized businesses for various reasons. In the future, this problem can be solved through technological progress in the field of computing optimization and the creation of specialized hardware solutions designed specifically for running AI models. Today, one of the possible ways to solve the problem is to use cloud technologies for artificial intelligence-based solutions. Such a system has a number of advantages and disadvantages. The main advantage is that the organization's infrastructure contains low-loading agents, and the main burden of computing for AI modules goes to the cloud infrastructure. The disadvantages directly follow from the properties of cloud solutions: some confidential data will have to be transferred to third-party servers for processing, and the performance of such a system will depend on the stability of the Internet connection between the company and the cloud. AI researchers are working on the problem of increasing not only the size of models, but also the requirements for their operation. One of the solutions, already being implemented in practice, is the compression of neural networks, that is, simplifying models while maintaining performance. Various methods are used for this, such as quantization and distillation of knowledge. In the future, model compression should increase the efficiency of calculations, and therefore reduce the requirements for the computing power of the device on which the model is running. In the field of security, this may mean the applicability of solutions with an AI module on personal computers, smartphones and other devices with low performance.

Training data

AI work in any area (not only in information security) is one of the most striking examples of the garbage in - garbage out principle. The result of an AI solution directly depends on the quality of training datasets. Collecting and labeling such training data is a serious problem for the entire field of AI. Special platforms are created to attract people to label data, such as Toloka. In the field of information security, the problem of training data is especially acute due to the specifics of network data - oversaturation with false positives with a small number of attacks. In real traffic, protection systems are rarely triggered, moreover, not all of them are true positives: information security solutions can react to suspicious, but not malicious activity as an attack. Because of this, training an AI model on such data can be ineffective.

Network data saturated with attacks can be collected either based on the results of cyber exercises, such as Standoff. An alternative way to obtain such data is to turn to AI again and generate a synthetic dataset. Synthetic training data has a number of potential advantages over real data: it is cheaper to collect, does not require anonymization and masking of data to maintain confidentiality, synthetic data can be modified and changed depending on the needs of a specific task. A synthetic training dataset can be used both separately and to enrich real data with specific attack features. However, it should be taken into account that the generation of high-quality synthetic training datasets today remains one of the urgent tasks that has yet to be fully resolved.

Lack of experts

The lack of specialists in the field of information security is one of the problems that can potentially be solved by the implementation of AI technologies. It is important to consider that in the foreseeable future, AI will reduce the workload of information security specialists, automate routine tasks, but at the same time, highly qualified specialists and experts with knowledge in the field of information security and artificial intelligence are needed to develop and integrate such solutions. The problem also occurs when implementing AI in other professional fields, that is, experts at the intersection of two industries are needed.

A possible solution to this problem could be hackathons, where teams consisting of information security and AI specialists will work. Solving interesting information security problems can help attract more AI experts to the industry.

The black box problem

One of the obstacles to the large-scale implementation of AI in information security is the black box problem of complex models. The problems of interpretability (how such an answer was obtained) and explainability (why such an answer was obtained) of the models' work go beyond information security and remain relevant for the entire field of AI technologies. However, in the field of information security, understanding the reasons for the results of the work is especially important for trust in the system. In addition, the transparency of models affects not only the ability to explain the answer, but also the speed and reliability of error correction. Interpretability and explainability of models can become key factors in the large-scale implementation of AI solutions in security, especially in autopilot mode. Artificial intelligence technologies will need to not only prove their reliability, but also confirm this by the predictability of the answer. The first step towards this has already been taken in models with reasoning technology, which allows them to "think" before responding and reproduce the chain of reasoning.

AI as a target for attacks and a source of threats

Artificial intelligence security is a developing field in which researchers still have a lot of work to do. It is important to understand that each implemented AI module not only allows you to expand or automate the capabilities of the solution, but also represents a potential target for attacks by intruders.

We expect that in the future, cybercriminals will gradually begin to attack embedded AI, including in security systems. The mass implementation of AI, for example, in website verification tools, can lead to attackers introducing exploit traps into the content or code of phishing sites. Developers of AI solutions need to analyze in advance what attacks their products may face in real conditions and implement protection as early as possible.

Models embedded in security processes can not only become targets for attacks themselves, but also be a source of threats. The introduction of generative AI to automate and accelerate the development and design of IT products, solutions and modules at all levels of production, starting from hardware, may lead in the foreseeable future to an increase in the number of both known and new vulnerabilities in information systems specific to AI-generated developments. Despite impressive capabilities, generative AI is not ideal and at the current stage of technology development requires control and verification of the results of work. Separately, cybersecurity specialists need to consider the threats that open-source models may carry. Cybercriminals can distribute models retrained for malicious activity, for example, embedding backdoors in the generated code.

CONCLUSION

Artificial intelligence technologies are firmly established in many professional fields, and information security is no exception. AI can perform various tasks at all stages of information security, assisting a specialist, taking on routine tasks, expanding the capabilities for detecting threats. Gradually, the role of artificial intelligence technologies in protection will become wider and larger: AI will fully take the place of the second pilot, and in the future, it can completely automate the solution of some tasks in the field of information security.

Despite the wide range of possible tasks for AI, a person in the field of cybersecurity is still irreplaceable. Even with a level of technology significantly superior to today's, there will remain many tasks for a specialist, such as the formation of a general protection strategy, control and management of AI tools, solving complex and non-standard issues. It is important to note that in the future, the ability to effectively work with AI tools will be an important component of the necessary competencies of an information security specialist. Thus, the technology will not lead to the exclusion of a person, but will entail a reduction in the number of staff due to increased labor productivity. Implementing artificial intelligence technologies in defense is a logical countermeasure taken in response to attempts by attackers to exploit new technologies for attacks. The defense side must win this race in order to prepare in advance for the expansion of cybercriminals' tools. However, it is necessary to take a responsible approach to the development and implementation of new technologies, take into account risks and threats, reasonably assess new opportunities, use their strengths in appropriate tasks and apply them where they will be truly effective. We recommend not to forget to adhere to general recommendations for ensuring personal and corporate cybersecurity: they remain relevant and important even during the rapid development of new technologies.

THE ROLE OF DIGITAL MARKETING IN ENHANCING PATIENT ENGAGEMENT IN PRIVATE MEDICAL CLINICS IN FERGANA

Vazirakhon Juraeva
Latvia, Baltic International Academy,
Master in Business Administration and Management
Email: juraevavazirakhon@gmail.com
Research Advisor: Dr.oec. Alla Iljina

ANOTĀCIJA

Šajā pētījumā tiek pētīts, kā digitālā mārketinga prakses trūkums privātajās medicīnas klīnikās Ferganas reģionā ietekmē to spēju iesaistīt un noturēt pacientus. Sekundārā datu izpēte kopā ar vietējo klīniku uzvedības novērošanu liecina, ka privātās klīnikas neizmanto mūsdienīgus rīkus, piemēram, tīmekļa vietnes, tiešsaistes plānošanu un aktīvas sociālo mediju platformas. Šīs veselības aprūpes iestādes tērē savus resursus tradicionālajām reklāmas metodēm, kurām ir vāja ietekme. Pētījums parāda, ka privātajā veselības aprūpes sektorā reģionālā teritorijā ir nekavējoties jāievieš digitālās transformācijas risinājumi, un pamata digitālā mārketinga rīku ieviešana var radīt būtiskas iespējas labākai pacientu lojalitātei, kā arī uzlabot privāto veselības aprūpes pakalpojumu efektivitāti visā reģionā.

Atslēgvārdi: Klientu iesaiste, Digitālais mārketings, Veselības aprūpes mārketings, Pacientu lojalitāte, Privātās medicīnas klīnikas

ABSTRACT

This study investigates how the lack of digital marketing practices in private medical clinics in the Fergana Region impacts their ability to engage and retain patients. A secondary data investigation along with observation of local clinic behavior shows that private clinics do not utilize contemporary tools such as websites along with online scheduling and active social media platforms. These healthcare facilities waste their resources on traditional advertising methods which show weak impact. The research demonstrates that the private healthcare sector in the regional area requires immediate adoption of digital transformation solutions and implementing basic digital marketing tools can create essential opportunities for better patient loyalty along with enhanced effectiveness of private healthcare services throughout the region.

Keywords: Customer engagement, Digital marketing, Healthcare marketing, Patient loyalty, Private medical clinics

IEVADS. INTRODUCTION

Major healthcare providers today need digital communication capabilities as an essential requirement to reach patients through digital platforms. Private medical clinics throughout Fergana along with other regions of Uzbekistan primarily depends on traditional rather than digital methods although global healthcare entities use digital tools for service quality enhancement and patient retention efforts. Research about digital marketing strategies in private healthcare settings becomes necessary because patient expectations have changed and people now use internet-based service consumption.

Recent global healthcare developments reveal the rising importance of digital presence that advanced after the pandemic affected digital behavioral patterns. Private clinics throughout Fergana behind other world healthcare institutions in adopting social media outreach together with online booking and virtual consultations along with content-driven educational programs. Local clinics face lowered customer satisfaction and competitive prospects because they fall short of meeting digital expectations patients have in their healthcare services delivery.

Digital marketing is widely recognized as a key driver of both customer engagement and brand recognition in the healthcare industry. According to McKinsey's 2022 report healthcare organizations that implement social media engagement combined with personalized email marketing and content marketing reach patient engagement levels that are 30–50% higher than other organizations while winning greater brand loyalty.[1] Top hospitals and private healthcare facilities like Cleveland Clinic and Apollo Hospitals employ digital marketing techniques to reach patients through education and interaction activities that strengthen their brand position in both U.S. and Indian health markets. The findings of Deloitte (2023) indicate that 72% of patients tend to select healthcare providers who actively engage with patients online through informative content.[2]

The digital healthcare sector of Uzbekistan shows slow development which continues to expand. Public hospitals in Uzbekistan have started using e-health tools from the Ministry of Health while selected Tashkent private medical clinics employ Instagram and Telegram bots alongside YouTube health promotion tools to enhance their communication with patients. Local assessments indicate that private medical facilities in the Fergana region and other regional locations have only a 25% rate of maintaining digital platforms which highlights a major space for potential patient-focused digital engagement.[3]

The problem of this research is that the Fergana region faces a problem due to the limited implementation of websites and structured digital marketing strategies along with patient online engagement by many private medical clinics in the region. Words-of-mouth recommendations and traditional promotion methods form the basis of most private medical operations in the Fergana region. This raises a critical question:

To what extent can digital marketing be used as a tool to enhance customer engagement in private medical clinics in the Fergana region of Uzbekistan?

The object of the research is the digital marketing activities of private medical clinics. The subject of the research is the relationship between digital marketing strategies and customer loyalty in the context of the Fergana region.

The aim of this research is to assess the current use of digital marketing by private medical clinics in Fergana and to propose practical recommendations for improving customer engagement through the implementation of digital strategies.

To achieve this aim, the following research tasks are set:

1. To define and analyze the concept, tools, and theoretical foundations of digital marketing and customer engagement;
2. To examine the level of digitalization and current online practices among private medical clinics in Fergana;
3. To evaluate customer behavior and preferences related to digital communication in healthcare;
4. To develop strategic recommendations for enhancing digital engagement in the private healthcare sector.

The study incorporates both qualitative case study analysis and secondary data collection as research methods.

It is hypothesized that the use of digital marketing strategies positively influences customer engagement in private medical clinics in the Fergana region.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

The framework of digital marketing gives clinics multiple internet-based resources including social media platforms alongside email strategies blog content distribution together with paid promotional avenues to sustain active patient communication. Such communication resources in healthcare provide facilities with a way to maintain sustained interpersonal connections with their patients. Modern clinics throughout the world operate CRM systems together with automatic appointment reminders and conduct online consultations and maintain patient relationships through routine social media posts.[4]

Digital marketing in healthcare refers to the use of digital communication technologies and platforms to promote health services, engage with patients, and improve overall service delivery. It includes a broad range of tools such as websites, social media, mobile apps, online reviews, email newsletters, SEO, and CRM systems. These tools allow healthcare providers not only to promote services, but also to educate patients, provide convenient access to care, and build long-term relationships.[5]

Customer engagement is considered one of the key concepts in modern marketing, especially in-service industries like healthcare. Brodie, Hollebeek, Juric and Ilic define it as "a psychological state that occurs by virtue of interactive, co-creative customer experiences with a focal agent/object (e.g., a brand)" in a service relationship context. It is multidimensional, involving cognitive, emotional, and behavioral components that lead to higher loyalty and advocacy.[6] Numerous studies have found that sustained engagement leads to increased loyalty, as engaged patients are more likely to return, recommend, and trust their healthcare provider.

In healthcare, patient engagement can include a variety of behaviors such as reading health content shared by a clinic, following its social media updates, booking online, giving feedback, and sharing their experiences with others. These engagement behaviors are strengthened by continuous, transparent, and valuable digital interactions. Hollebeek and Macky emphasize that customer engagement is positively influenced by the perceived value, trust, and interactivity offered by the service provider's digital communication.[7]

Digital marketing tools in healthcare support both functional and relational engagement. Websites and mobile apps offer functionality and convenience, while blogs, personalized emails, and social media provide emotional and educational value. Effective digital strategies increase not only visibility but also the credibility and perceived professionalism of private clinics.

Another important component is brand awareness. In healthcare, patients often make decisions based on familiarity and trust. Brand awareness is the first step in building that trust. Clinics with strong digital presence—appearing in search results, having a clear brand image on social media, and collecting positive online reviews—are more likely to be perceived as credible and attract new patients.[8]

Moreover, the integration of digital platforms improves continuity of care. By offering features such as appointment reminders, follow-up emails, and feedback forms, private clinics can stay in touch with patients, reduce no-show rates, and gather important service insights.[9] In the context of Uzbekistan, where digital health tools are increasingly available, clinics that adopt digital marketing gain a competitive advantage.

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

Overview of Private healthcare sector in Fergana region. In Fergana Region, there are a large number of services offered by 31 private hospitals and 44 private outpatient clinics in the private healthcare sector.[10] Such service diversity is an indicator of both the changing health demands of the population and a new tendency towards specialization and patient-oriented medical care in the private medical sphere of the region.

Of the 31 privately run hospitals, 10 hospitals provide general internal medicine and surgical services and are multi-specialty centers who offer a comprehensive inpatient service. There are 5 hospitals which are women's hospitals dealing with maternity and gynecology, and they provide obstetric care to women. Inpatient cardiovascular and chronic disease management is met in 4 hospitals that provide cardiology and therapeutic care. Moreover, 3 hospitals are concentrated on the care of children and adolescents. There are lesser numbers of facilities committed for orthopedics and rehabilitation (2 hospitals) as well as diagnostic and day surgical service (3 hospitals) which include minor procedures and imaging. Another 4 hospitals serve specific niches e.g. ENT, urology and other niche areas if you will, and therefore provide gaps in advanced or rarely provided services gaps.

The private outpatient clinics which offer a wide range of services as well but with a slightly more diverse distribution: 10 clinics implement generalized or family medicine and therefore act as a first stage of contact for many people who seek non-emergency care, and 8 clinics discharge dental services, which do indicate increasing demand for dental and orthodontic treatment. 6 clinics provide diagnostic service, including labs and imaging centers that will ensure early detection and routine screening. Other specialties are gynecology and women's health (5 clinics), pediatrics (4 clinics), and dermatology or cosmetology (4 clinics) which provide services, which are particularly attractive for urban population. Last but not the least there are 3 clinics dedicated to ENT; 2 clinics whose main practice is ophthalmology and 2 clinics which focus on mental health or neurology.[11]

This distribution shows that private outpatient clinics are mainly used in providing day to day medical needs, preventive checks, and non-urgent outpatient specialist services in settings where public supply of services may be under pressure or inadequate.

Combined these private hospitals and clinics show a well thought out healthcare landscape with generalists and specialists. Clinics focus on providing convenient, outpatient, and preventive healthcare, while hospitals focus more on complex and inpatient services. Such role division supports complementary yet patient-centered system worthy of a market demand as well as a constant healthcare modernization process in the region.[12]

The increasing numbers of healthcare providers in Fergana Region is sub-service of the overall strategic course of the Government of Uzbekistan to reform and modernize the national healthcare system. For the past few years, the Uzbek government has made private sector development the heart of its agenda for healthcare reforms, in the hope of relieving pressure on public infrastructure and promoting innovation with the goal of bettering national service delivery standards.[13]

This movement gained momentum in 2022 when the President of Uzbekistan signed a decree on priority expansion of private medical services and ensuring an attractive environment for private investors in this sphere.[14] Government vision is to increase the role of private sector in healthcare delivery to 50% especially outpatient and diagnostic services. This is supposed to encourage healthy competition amongst providers, increase the availability of specialized care and give patients room to make better informed decisions concerning their medical treatment.[15]

In addition, the government has passed changes in the form of tax incentives, streamlined licensing process and the adoption of new forms of public-private partnerships in order to attract domestic and international investments in the healthcare industry. One of the stand-out samples of Fergana Region is the proposed construction of a first-class multidisciplinary hospital, aimed to become a regional center for high-class treatment and medical training. The project is a PPP type project and is expected to involve the private sector in management and provision of the service.[16]

Anlysis of digital presence and tools used by Private clinics. In the current state of the healthcare systems, digital presence and communication tools are not simply some form of a marketing tool – they are critical for making access, trust and long-term engagement between patients and medical professionals possible. As expected from the theoretical framework, digital marketing in healthcare consists of such tools as websites, online platforms, messengers, and online directories interested in influencing the perceptions and behavior of the patients.

However, in the Fergana Region the use of digital tools for private medical facilities is extremely underdeveloped. Most clinics still use old method word of mouth and printed advertisements with little attempts to develop online credentials. This subchapter is focused on current state of digital presence of private clinics in the region and, specifically, on the presence or lack thereof on such platforms as websites, Instagram, Telegram, and Facebook. It also assesses how these tools are (as well as are not) used to communicate with patients, to attract new visitors, to improve the overall service experience.

Through a study of available public data and social media profiles and online business directories, this analysis indicates massive digital strategy voids on the part of most private healthcare providers in Fergana. These findings form a base for understanding the limits of what is currently being practiced and highlights the necessity for more digital integration in order to enhance patient engagement.

Digital Invisibility and Its Impact on Patient Loyalty. In a digital era, the success of the healthcare institutions in keeping an active and informative presence on the Internet is becoming more and more a prerequisite of quality and accessibility of service. Using digital tools clinics are not only able to contact new patients, but also to keep up with existing communication, to build a trust and to provide a smooth process during the journey of patients. Notwithstanding this global trend, private medical clinics in the Fergana Region are very slow in implementing digital channels for outreach and interaction with customers. This digital inertia manifests in several key areas, each contributing to weakened patient engagement and reduced loyalty.

1. Lack of Official Websites: An overall analysis of various public online directories, including GoldenPages.uz, YellowPages.uz and, Google Maps, shows a definite and uniform pattern: private clinics in Fergana Region lack professional, individual websites. Some clinics are mentioned in online directories; but they hardly ever offer choice of services, staff portraits or online booking. The lack of official websites dramatically reduces their chances of being found online and damages patient trust too.[16] Without a structured digital platform, clinics lose credentials of communication, service provision capabilities and new customers, digitally literate. This gap also stops clinics from ranking in search engines or being found using targeted local searching. Consequently, most potential patients have to use offline references, word-of-mouth or printed material and this diminishes the transparency and accessibility of healthcare services by the private firm.
2. Dependence on Social Media (and Its Limitations): Social media has replaced official websites as the biggest digital tool that some private clinics are using in the region without these official websites. However, tools such as Instagram, Telegram, and Facebook are not widely utilized; principally they remain active to post a holiday calendar, or an announcement, or even some

occasional visuals. Only a small percentage, however, whose addresses are listed in regional directories, refer to active social media accounts, and in the majority of cases, such clinics post only irregularly, and do not have a content strategy, or follow branding consistency. These platforms experience minimal engagements. Comments rarely receive a response and posts are devoid of interactive elements, polls, Q&A or patient testimonials. To this end, social media presence in this context acts more as a virtual notice board than an interactive marketing or communication avenue. Many pages also do not have links to booking systems, service menus as well as contact forms thus reducing their usability for potential patients.

3. No Use of Advanced Digital Tools: Much of the communication with patients takes place in the form of manual messaging using Telegram or WhatsApp but there is no system for scheduling, automation or recording of the communication. This lack of structure in turn can result in miscommunication, lost inquiries and inconsistent follow-up — all of it having a negative impact on the outcome of the patient experience and long-term engagement. As shown in the Figure 1 below, tools such as CRM systems, email communication platforms, and structured online booking systems are hardly used by clinics in the region, highlighting a major gap in digital infrastructure and patient management.
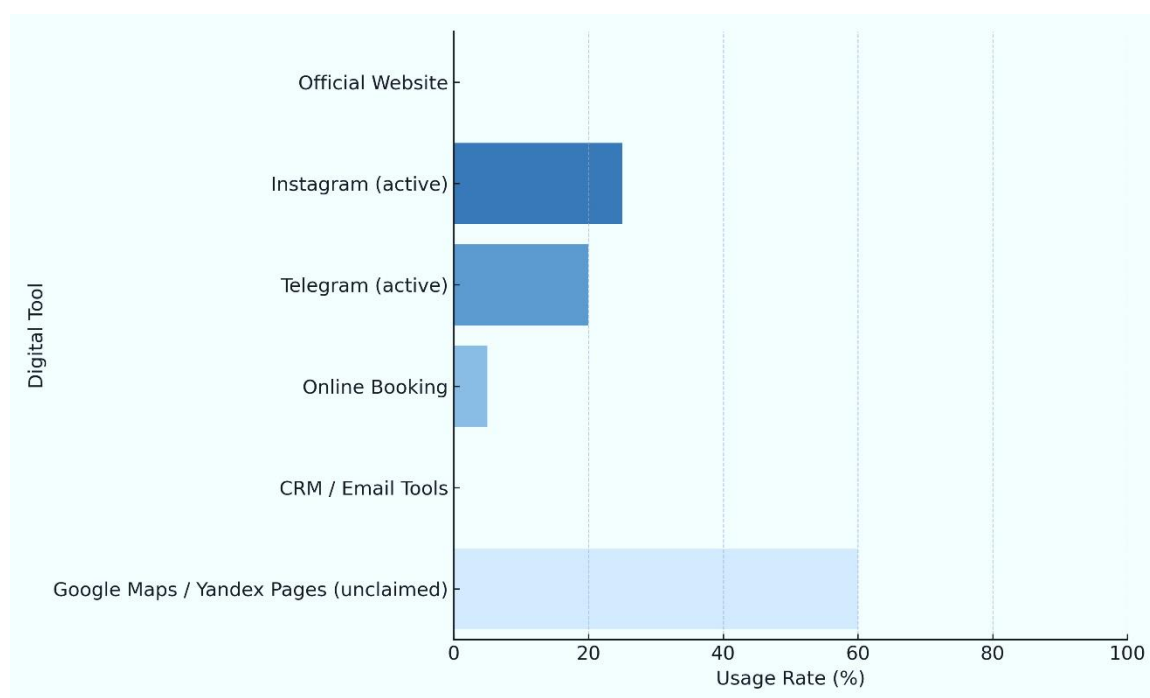
Figure 1: Diagram illustrating digital tool usage among private clinics in Fergana Region

(the data was prepared by the author)

4. Unmonitored Online Listings and Reputation: There are many clinics listed on GoldenPages.uz and even Yandex, yet most of them don't claim or manage those listings. Contact data can be outdated, clinic hours may not be listed, as well as reviews if they exist, often go unanswered. The lack of reputation management on such sites as Google Business or Yandex Maps proves that clinics fail to use patient reviews in improving the quality of the services or creating

credibility. During a time when the online review has an enormous impact on decision making, this lapse reflects a major missed opportunity.

5. Overall Observations: Taken together, these findings suggest that digital engagement among private clinics in Fergana is sporadic, informal, and underdeveloped. In this case, all of these tools which are common in private healthcare settings anywhere else don't even exist here. Rather, clinics almost entirely fall back on traditional means of communication, informal referrals, and unstructured Telegram or telephone conversations. The nature of digital marketing and communication in the private healthcare realm of Fergana represents a serious gap and a big opportunity. Clinics opting to spend money even on basic digital infrastructure can greatly increase visibility, service efficiency and patient satisfaction. This analysis justifies central thesis hypothesis — that digital tools, if adequately used in the region, could substantially increase the level of customer engagement in private medical clinics.

Evaluation of research results. Main findings of a survey among Fergana Region patients give useful insights about the ways digital factors affect engagement with private medical clinics. A large number of those were concerned that online presence of a clinic plays a major role in the choice of a medical provider. The survey pointed that social media and recommendations from friends were the leading sources of information while official clinic websites were rarely mentioned. Yet, quite a sizeable proportion of patients found a clinic's online presence as "somewhat significant" or "very significant" in their healthcare decisions.

Convenience and a rapid response were highly appreciated by patients when it came to private healthcare providers; quick booking, gaining access to information, and having fewer queues in front of them all mattered when making a selection. Patients esteemed digital features having online booking and communication with a doctor via messages, yet they are not of frequent use at this time.

The survey highlighted critical barriers to digital engagement including concerns about privacy, lack of digital competence on the part of certain demographics (old individuals, and dwellers of rural landscapes), and an undeniable preference for face-to-face interactions. Unfortunately, only 57% of the respondents actively support development of digital offers, while more than 75% stated that clinics that often post health-related information online is what motivates them.

There was a variety in the level of respondents' satisfaction with the existing digital communication of private clinics. While a certain percentage of the respondents stated that their digital engagement was not good or bad, a considerable number of them felt that the online communication strategies for Fergana's private clinics, need to improve.

The results indicate low levels of present digital interaction, but there is a clear cry of the patients for access, responsiveness, and information online, which can significantly increase engagement and long-term loyalty.

Practical Recommendations for improving digital marketing implementation. Based on this research, the following recommendations are designed to enhance patient engagement as well as to promote patient loyalty in private healthcare facilities in the Fergana Region:

1. Develop Official Clinic Websites: Private clinics are called upon to develop sites with easy-to-use interfaces for presenting their services, profiles of their staff, contact information, as well as possibilities for online booking and comment submission. This enhances their online reach, facilitates trust and simplifies accessing of appointments.

2. Implement Consistent Social Media Strategies: Keeping dynamic and reliable profiles on Instagram, Telegram, and Facebook helps clinics to stay in touch with patients more often. Adding quality health insights, service notification, patient feedback, and educational content to such platforms can enhance patient-clinic relationship and promote engagement.

3. Introduce Online Appointment and Consultation Tools: Using digital solutions such as booking systems, telemedicine and chat-support makes our patients' experience more convenient and smoothens bureaucratic work. These tools make service delivery better when it comes to the speed and quality of services as well as patients satisfaction.

4. Invest in Digital Reputation Management: Make sure that clinics own and maintain a profile on digital directories such as Google Maps, Yandex, and GoldenPages. Actively responding to the comments of patients, timely updating the key information, and motivating happy patients to provide their opinion help increase the clinic's public standing.

5. Apply Basic CRM and Email Marketing Tools: With the use of basic CRM and email systems, clinics could automate reminders for patients; inform their patients of health related news; and solicit their valuable feedback regarding health issues through the use of surveys. The clinic nurtures long-term loyalty and relief by incessantly contacting patients.

6. Make sure staff has digital communication skills provided by suitable training: Train administrative and marketing staff to adopt standard digital ways of behaving, in order for their online response to be professional, timely and demonstrate the clinic's commitment to quality and trustworthiness.

7. Monitor and Analyze Digital Performance: Website traffic, booking conversion, and social media interactions are metrics to measure in order to decide what stops patients and generates success. Make use of these insights to polish and improve further digital strategies.

KOPSAVILKUMS. CONCLUSION

This study demonstrates that digital marketing plays a vital role in enhancing patient engagement, which in turn contributes to stronger patient loyalty in private medical clinics. Fergana's private healthcare industry has minimal digital adoption, most clinics still have no or very limited digital resources such websites, social media and online scheduling facility. Despite these limitations, the survey from the management perspective reports that convenience in the cyber space is a cornerstone for patients, and the strength of a clinic's on-line profile plays an ever-growing role in the service offerings. The study confirms the main proposition that Proper use of digital marketing can enhance a lot the way patients relate and stay loyal to clinics. It's easy digital upgrades for clinics to promote bonds with patients, increase services accessibility, and develop trust necessary for long-term patient loyalty. Digital engagement is, therefore, critical in any healthcare firm for growth, as well as in service quality levels in the modern healthcare sector.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. McKinsey & Company, 2021. *Marketing in healthcare: Improving the consumer experience*. McKinsey & Company. Retrieved from https://www.mckinsey.com/industries/healthcare/our-insights/marketing-in-healthcare-improving-the-consumer-experience
2. Deloitte. (2023). *2023 global health care outlook: Accelerating industry transformation*. Deloitte Insights. Retrieved from https://www2.deloitte.com/content/dam/Deloitte/global/Documents/gx-health-care-outlook-2023-report-consolidated.pdf
3. Ministry of Health of the Republic of Uzbekistan. (2023). *Digital health initiatives in Uzbekistan*. Retrived from https://www.minzdrav.uz/ru/lists/view/3573
4. Chaffey, D., & Ellis-Chadwick, F. (2019). *Digital Marketing: Strategy, Implementation and Practice* (7th ed.). Pearson Education.
5. Kotler, P., Shalowitz, J., & Stevens, R. J. (2021). *Strategic Marketing for Health Care Organizations: Building a Customer-Driven Health System* (2nd ed.). Jossey-Bass.

6. Brodie, R. J., Hollebeek, L. D., Juric, B., & Ilic, A. (2011). Customer engagement: Conceptual domain, fundamental propositions, and implications for research. *Journal of Service Research, 14*(3), 252–271. https://doi.org/10.1177/1094670511411703

7. Hollebeek, L. D., & Macky, K. (2019). Digital content marketing's role in fostering consumer engagement, trust, and value: Framework, fundamental propositions, and implications. *Journal of Interactive Marketing, 45*, 27–41. https://doi.org/10.1016/j.intmar.2018.07.003

8. Keller, K. L. (2013). *Strategic Brand Management: Building, Measuring, and Managing Brand Equity* (4th ed.). Pearson Education.

9. Smith, A. (2023). Patient retention through digital marketing. *Health Marketing Journal*.

10. Goldenpages.uz. (2023) Private clinics in Ferghana and Ferghana region https://www.goldenpages.uz/en/rubrics/?Id=107164&utm

11. Number of outpatient clinics (2024) https://stat.uz/en/official-statistics/social-protection

12. Daryo.uz. (2024). *Private Sector Share in Healthcare Aimed to Reach 50%*. Retrieved from https://kun.uz/en/news/2024/01/05/govt-plans-to-increase-share-of-the-private-sector-in-medicine-to-50

13. President.uz. (2023). *Reform Strategy for Health Sector in Uzbekistan*. Retrieved from https://president.uz/en/lists/view/6978

14. President.uz (2023). Presidential Decree on Healthcare Sector Development and Investment Promotion. Retrieved from: https://president.uz/en/lists/view/6978

15. Daryo.uz (2024). Private Sector Share in Healthcare Aimed to Reach 50%. Retrieved from: https://kun.uz/en/news/2024/01/05/govt-plans-to-increase-share-of-the-private-sector-in-medicine-to-50

16. Gov.uz (2023). *Public-Private Partnership in Healthcare: New Hospital Construction in Fergana Region*. Retrieved from: https://www.gov.uz/en/pages/ppp_healthcare

ОСНОВНІ АСПЕКТИ ПОКРАЩЕННЯ СТАЛОГО РОЗВИТКУ ПІДПРИЄМСТВА В УМОВАХ ВОЄННОГО СТАНУ

Ландарь Анастасія
Україна
Державний університет інтелектуальних технологій і зв'язку
Публічне управління та адміністрування
landaranastasia169@gmail.com
Науковий керівник:
Кандидат економічних наук
Доцент кафедри публічного управління та цифрової економіки
Толкачова Галина

АНОТАЦІЯ

У статті зосереджено увагу на ключових напрямах покращення сталого розвитку підприємства в умовах воєнного стану. Досліджено вплив зовнішніх ризиків, зокрема військових дій, на виробничу діяльність, фінансову стабільність і репутаційний капітал підприємств. Приділено особливу увагу впровадженню інновацій, цифровізації та партнерству з державними й міжнародними структурами для досягнення цілей сталого розвитку. Визначили роль людського капіталу як основу розвитку підприємства.

Ключові слова: сталий розвиток, воєнний стан, підприємство

ABSTRACT

The article focuses on the key directions for improving sustainable enterprise development under martial law conditions. The impact of external risks, particularly military actions, on production activities, financial stability, and corporate reputation has been examined. Special attention is given to the implementation of innovations, digitalization, and partnerships with governmental and international organizations to achieve sustainable development goals. The role of human capital is identified as a foundation for enterprise development.

Keywords: sustainable development, martial law, enterprise

ВСТУП. INTRODUCTION

Введення воєнного стану на території України суттєво впливає як на суспільне життя громадян, так і на економічну систему держави. Сталий розвиток підприємств у воєнний період набуває особливої актуальності. Порушення економічної стабільності, руйнування інфраструктури, міграція населення та зростання суспільних проблем вимагають нових підходів до управління та стратегічного планування. В умовах воєнного стану підприємства мають зосереджуватись не лише на збереженні функціоналу, а й на розвитку в довгостроковій перспективі, що вимагає комплексного підходу до сталого розвитку. Тому на сьогодні варто виділити низку позитивних та негативних ключових бар'єрів, які мають вплив на розвиток підприємств.

ОСНОВНІ ТЕОРЕТИЧНІ ТА ПРАКТИЧНІ ПОЛОЖЕННЯ. MAIN THEORETICAL AND PRACTICAL PROVISIONS

Головним аспектом треба виділити стратегічне планування та адаптивне управління. Без стратегії та чіткого управління підприємство не може повноцінно визначити шлях свого розвитку, адже саме стратегія формує основні принципи, що спрямовують керівників до

досягнення поставлених цілей на довгостроковий період. При формуванні стратегічного плану управління підприємства в умовах війни, слід враховувати політичні та економічні умови, в яких вони перебувають. Одним з таких прикладів є обмеження можливості доступу до певних ресурсів. Наприклад, в умовах воєнних дій влада може вводити обмеження на переміщення товарів та надання послуг, що спричиняє зменшення можливостей для бізнесу щодо здобуття їм необхідного. Ці обмеження заважають підприємствам забезпечити доступ до необхідної сировини та обладнання для їхньої продуктивної діяльності.

Завдяки міжнародним організаціям які допомагають українському бізнесу, певний відсоток економічного становища все ж таки покращився. До прикладу Міжнародна гуманітарна організація Mercy Corps, у рамках програми підтримки економічної стійкості України, надає фінансову допомогу для малого та середнього бізнесу, котрі зазнали збитків через військові дії. Дана ініціатива актуальна для підприємств у Києві, Київській та Дніпропетровській областях. Претендувати на гранти можуть як релоковані, так і місцеві підприємства. [1]. Така перспектива дала поштовх привернути увагу підприємців та повернути їх на український ринок. Держава має впроваджувати різноманітні послуги та розробляти реформи, адже важливим фактом економічної стабільності є люди – це працівники, підприємці.

Воєнні дії створюють ризики, що безпосередньо впливають на виробничу та логістичну діяльність, а також на фінансову стабільність. Втрата фізичних активів, порушення контрактних зобов'язань і зміни валютного курсу змушують бізнес переглядати моделі управління ризиками, формуючи антикризові стратегії. Логістика завжди мала вагомий характер у складовій економіки, а в стані війни її роль почала тільки зростати. Ефективність доставлення товарів неабияк впливала на функціонування підприємств, збереження робочих місць та надходження валюти в державу. Головною проблемою стала блокада портів у Великій Одесі, звідки до початку війни вирушало понад 70% українських експортних товарів. Тимчасова відсутність морських шляхів змусила компанії шукати альтернативні варіанти, зокрема, через Польщу, Румунію та сусідні держави. Ст. 6 Закону України «Про мультимодальні перевезення» передбачає надання державної допомоги для будівництва та облаштування мультимодальних терміналів, надання послуг мультимодальних перевезень відповідно до Закону України "Про державну допомогу суб'єктам господарювання», а також створення умов для розвитку державно-приватного партнерства. [2]. Інвестиції у розвиток мультимодальних перевезень, використання логістичних хабів у безпечних регіонах України та створення резервних логістичних маршрутів через країни ЄС можуть покращити економічне становище та функціонал підприємств.

Використання інноваційних технологій та цифрових інструментів дозволяє підвищити ефективність і зменшити залежність від фізичних ресурсів. Співпраця з державними, неурядовими та міжнародними організаціями відкриває нові можливості для фінансування, експертизи та захисту інтересів бізнесу. Тривалий час паперовий документообіг був ключовим в Україні, створюючи суттєві незручності для підприємств та громадян. Однак, з розвитком технологій та зростанням вимог до ефективності, все більше компаній та державних установ обирають електронний документообіг. Позитивним аспектом інтеграції електронного документообігу є створення цілісного інформаційного простору в межах підприємства та упорядкування всіх процесів в уніфікованій системі, яка забезпечує ефективний документообіг за умови віддаленого доступу до структурних підрозділів; прискорення і прозорість руху документації, та надання послуг; можливість колективної роботи в межах єдиної інфраструктури (кілька спеціалістів можуть працювати з одним

документом одночасно); надзвичайно швидкий пошук необхідної документації (пошук здійснюватиметься в базі даних підприємства). Усі вище вказані факти відкривають широкі можливості для розвитку та підвищення ефективності робочого процесу на підприємстві.

Покращення сталого розвитку неможливе без залучення і збереження кваліфікованого персоналу. Інвестиції в навчання, психологічну підтримку та створення безпечних умов праці формують основу для збереження людського капіталу. Так, за оцінками НБУ, робоча сила у віці 15–70 років у 2023 році скоротилася більш ніж на чверть порівняно з 2021 роком. Вагомий вплив мали демографічні втрати та окупація, а також перехід до категорії економічно неактивного населення (через ймовірні складнощі з працевлаштуванням для ВПО, необхідність догляду за іншими членами родини, збільшення кількості пенсіонерів, відсутність необхідних ринку праці навичок). Зменшення участі в трудовій діяльності було помітним у всіх областях України, найвідчутніше – у регіонах, де тривали активні бойові дії. [3]

Дієвими варіантами покращення ситуації на ринку робочої сили могли б бути інвестиції в безперервне навчання та перекваліфікацію, прикладом є проведення онлайн-курсів для працівників з новітніми технологіями та адаптивними навичками, партнерство з освітніми установами для підготовки кадрів залежно від потреб підприємства, організація короткотермінових тренінгів для ВПО та осіб, що втратили попередню зайнятість. Важливим людським факторам також слід приділяти увагу, а саме психологічній та соціальній підтримці персоналу. Забезпечити доступ до психологічної допомоги, особливо для працівників із зон бойових дій або внутрішньо переміщених осіб, формувати корпоративні ініціативи взаємодопомоги (груп підтримки, тимчасове житло). В інтересах підприємства важливо зберігати робочі місця, саме тому, важливими аспектом покращення може бути участь у державних програмах субсидування заробітних плат, використання моделей тимчасової зайнятості або стажування для утримання потенційних працівників. Ці заходи дозволять не лише зберегти кадровий потенціал у короткостроковій перспективі, а й сформувати стійку основу для сталого відновлення у післявоєнний час.

РЕЗУЛЬТАТИ ДОСЛІДЖЕНЬ ТА ОЦІНКА. RESEARCH RESULTS AND EVALUATION

Внаслідок проведеного дослідження з'ясовано, що стратегічне планування та адаптивне управління є визначальними елементами для сталого функціонування підприємств в умовах війни. Виявлено, що обмежений доступ до ресурсів, затримка в логістиці та фінансові втрати змушують підприємства розробляти нові підходи до антикризового управління. Позитивний вплив надають програми підтримки малого та середнього бізнесу від міжнародних організацій, таких як Mercy Corps, які сприяють поверненню підприємців на ринок. Дослідження також виявило, що блокада українських портів та тимчасова відсутність морських коридорів спонукали бізнес шукати альтернативні маршрути постачання через країни Європейського Союзу. Законодавче врегулювання мультимодальних перевезень відкриває перспективи для розбудови логістичних хабів у безпечних регіонах. Значний потенціал для зростання ефективності підприємств демонструє цифровізація, зокрема впровадження електронного документообігу, який сприяє швидшій взаємодії між відділами. Окремо підкреслено критичну ситуацію з людськими ресурсами: скорочення робочої сили, зумовлене демографічними та воєнними факторами, вимагає інвестицій в освіту, перепідготовку та психологічну підтримку співробітників.

Запропоновано декілька практичних рішень, серед яких гнучкі форми зайнятості, співпраця з освітніми закладами та державні програми субсидування заробітної плати.

ВИСНОВОК. CONCLUSION

Умови воєнного стану, що постали в Україні, кардинально змінюють операційні умови для підприємств, накладаючи нові проблеми та потребуючи стратегічно обґрунтованих підходів. Сталий розвиток у цьому контексті вимагає інтегрованого бачення, що включає стратегічне передбачення, гнучке управління, оновлення логістичних процесів, цифрову модернізацію та інвестиції в людський потенціал. Ефективне управління ризиками, державна та міжнародна підтримка, а також інвестиції в компетентних працівників є фундаментом для забезпечення економічної стійкості та відновлення бізнесу після завершення воєнних дій.

СПИСОК ВИКОРИСТАНИХ ДЖЕРЕЛ. REFERENCES

1. Фінансова допомога для малого та середнього бізнесу, що постраждав від війни. Взято з: https://uerp.mercycorps.org/page/brYXAKWK
Financial assistance for small and medium-sized businesses affected by the war. Retrieved from: https://uerp.mercycorps.org/page/brYXAKWK
2. Закон України «Про мультимодальні перевезення» офіц. текст. ст.6. Взято з: https://zakon.rada.gov.ua/laws/show/1887-20#Text
Law of Ukraine "On Multimodal Transportation", official text. Article 6. Retrieved from: https://zakon.rada.gov.ua/laws/show/1887-20#Text
3. НБУ, Інфляційний звіт за квітень 2024 року с.26. Взято з: https://bank.gov.ua/admin_uploads/article/IR_2024-Q2.pdf
National Bank of Ukraine. Inflation Report for April 2024, page 26. Retrieved from: https://bank.gov.ua/admin_uploads/article/IR_2024-Q2.pdf

"GREEN" CONSTRUCTION AND "GREEN" STANDARDS AS THE MOST RELEVANT AND PROMISING AREAS OF RESOURCE CONSERVATION IN CONSTRUCTION

Dmytro Novykov
graduate student
Kyiv National University of Civil Engineering and Architecture,
Ukraine, Kyiv
Vasil Bartko
graduate student
Kyiv National University of Civil Engineering and Architecture,
Ukraine, Kyiv

ABSTRACT

The concept of "green" construction and "green" standards in construction are considered. The advantages and disadvantages of "green" construction are defined, the requirements for "green" construction and the main standards for "green" construction are highlighted.

Keywords: ecology, green construction, innovations, technologies

АНОТАЦІЯ

Розглянуто поняття "зелене" будівництво, "зелені" стандарти під час будівництва. Визначено переваги та недоліки "зеленого" будівництва, виділено вимоги до "зеленого" будівництва та основні стандарти до "зеленого" будівництва.

Ключові слова: екологія, зелене будівництво, інновації, технології

INTRODUCTION

"Green" construction is environmentally oriented and is based on various standards that include energy conservation and rational use of natural resources throughout the entire life cycle of a building - from construction to demolition. Certification systems are the basis for the promotion and implementation of the most modern technologies, solutions, materials; the implementation of innovations and the ability to assess their effectiveness. Construction and operation in accordance with the principles of voluntary certification systems helps to solve a number of problems at the same time: improving safety, high quality of work, ensuring comfort, long-term operation, and subsequent savings during the operation of the facility. It is important to note that "green" norms and standards offer actions that prevent pollution and deterioration of the environment, rather than aimed at eliminating the damage caused. This principle exists in all "green" standards and is becoming increasingly important. [2]

BASIC THEORETICAL AND PRACTICAL PROVISION

In the process of studying the term "green" construction, researchers have given a large number of its interpretations, descriptions of its essence. It is important to note that the adjective "green" in the phrase "green" construction" is well-established and generally accepted, this term originally came from a movement that arose in the early 70s in Western Europe and opposed environmental pollution, the harmful effects of the development of nuclear energy, for the

reduction of military budgets, decentralization and democratization of public life. Currently, "green" is a synonym for "environmentally friendly". According to experts [2], "green" construction is an industry that includes the construction and operation of buildings with minimal impact on the environment. The main objective of "green" construction is to reduce the level of resource consumption (energy and material) throughout the life cycle of a building: from the selection of a site for design, construction work, operation, to repair and demolition. It is important to note that "green" construction is innovative construction with an emphasis on energy efficiency and environmental friendliness in the broad sense of the word. Three main principles of eco-objects can be distinguished: rational use of renewable resources (energy, land, water), minimization of the negative impact of the real estate on the environment during construction, operation, disposal, and creation of a comfortable microclimate for people through the implementation of "green" standards. [3] According to experts, "green" construction is an approach to the design, construction and operation of buildings that contains a number of solutions, measures, materials, approaches and equipment aimed at energy and resource efficiency. It is noted that certification for compliance with "green" construction standards allows not only to obtain an independent assessment of the construction project, but also to increase the investment attractiveness of the project. [2]

The existing approaches to defining the term "green" construction reflect the relevance and importance of this area for the implementation of business solutions in the field of resource conservation. We propose to synthesize existing interpretations and understand "green" construction as a direction of design, construction and operation of real estate objects, the purpose of which is to ensure the minimization of the negative impact on the environment through the rational consumption of natural resources, subject to an increase in the quality characteristics of the object and the provision of comfortable conditions for its users.

RESEARCH RESULTS AND THEIR EVALUATION

Factors influencing the acceleration of the growth rate of the green building industry:
- ✓ Government incentives,
- ✓ Popularization of ideas and principles of green building,
- ✓ Tightening of legal requirements,
- ✓ Emergence of specialists in relevant fields,
- ✓ Increasing availability of green technologies,
- ✓ Creation of a national standard. [4]

"Green" buildings can include a large list of requirements, including energy resources, indoor air quality, and the requirement that all building materials be from local sources. "Green" buildings have both obvious and hidden advantages that are revealed during operation. Obvious advantages include a reduction of 8-10% or more in operating costs and higher rent. Hidden advantages include more comfortable working conditions in these buildings, demonstrating to competitors one's attitude to environmental protection. [4,5]

In general, eco-development today is not an urgent need dictated by external factors, but rather the desire of the developer to use the competitive advantages of a unique project. After all, many tenants of office buildings are ready to invest in creating the image of a socially responsible company, offering comfortable working conditions for their employees. A similar situation is observed in residential construction. The relative high cost of environmentally friendly technologies makes them inaccessible to the mass consumer - they are used mainly in the construction of luxury housing. In addition, it is noted that "green" construction is not only the construction of high-tech buildings that reduce the burden on the environment, but also concern for the health of their inhabitants.

CONCLUSION

We believe that the development and implementation of green construction standards stimulates business, the development of innovative technologies, the economy, improves the quality of life of society and the state of the environment. They are a tool for smart economics - they save money at all stages and contribute to integration into the global trend, are the key to foreign investment and recognition at the global level. [4] Certification according to green standards allows the developer to gain a marketing advantage in the market, the opportunity to quickly hand over or sell buildings, increase the capitalization rate, attract additional financing, provide the building with a stable and solvent flow of tenants. For the tenant, this is an opportunity to create a more comfortable environment for employees, increase labor productivity, save on operating costs, strengthen their reputation in the market and contribute to corporate social reporting. For the state, green construction standards are a lever for the introduction of innovative technologies and support for the implementation of environmental legislation, as well as a market mechanism for improving the quality of the environment.

REFERENCES

1. LEED Reference Guide for Green Building Design and Construction For the Design, Construction and Major Renovations of Commercial and Institutional Buildings Including Core & Shell and K–12 School Projects 2009 Edition, 674p.
2. What is BREEAM? // Official BREEAM site. URL: http://www.breeam.org/about.jsp?id=66
3. GreenBookLive. URL: http://www.greenbooklive.com/ search/scheme.jsp?id=202
4. Jenks M., Jones C. Dimensions of the Sustainable City. — Springer, 2010. — 282 p. — (Future City, Volume 2). — ISBN 978-1-4020-8646-5.
5. Yan Ji and Stellios Plainiotis (2006): Design for Sustainability. Beijing: China Architecture and Building Press. ISBN 7-112-08390-7

ІННОВАЦІЙНІ МЕХАНІЗМИ РОЗВИТКУ ЗРОШЕННЯ І ДРЕНАЖУ В УКРАЇНІ В УМОВАХ ЗМІН КЛІМАТУ

Михайло Ромащенко, Україна,
Інститут водних проблем і меліорації НААН України,
e-mail: mi.romashchenko@gmail.com

Володимир Пантелеєв, Україна,
Київський аграрний університет НААН України,
e-mail bernstain@ukr.net

ABSTRACT

To ensure the success of the reform of the irrigation and drainage sector, the main procedures for regulating and managing the water management complex must be based on innovative principles. The main directions for introducing an innovative mechanism into the development of irrigation and drainage in Ukraine are outlined. The integration of measures of the innovative mechanism for regulating and managing the development of irrigation and drainage in Ukraine was carried out for the first time. The innovative paradigm of the mechanism for developing irrigation and drainage should be laid at the basis of Ukraine's water policy.

АНОТАЦІЯ

Для забезпечення ефекту від реформування сфери зрошення та дренажу, основні процедури із регулювання та управління водогосподарським комплексом повинні гуртуватися на інноваційних засадах. Викладено головні напрями запровадження інноваційного механізму у розвиток зрошення і дренажу в Україні. Інтеграція заходів інноваційного механізму регулювання та управління розвитком зрошення і дренажу в Україні проведено вперше. Інноваційну парадигму механізму розвитку зрошення та дренажу потрібно покласти в основу водної політики Україні.

Ключові слова: дренаж, зрошення, інновації, управління

ВСТУП. INTRODUCTION

Інновації є сучасним методологічним підходом для отримання бажаних оптимальних результатів щодо управління складними системами. З цією метою для досягнення вищої врожайності культур за використанням меншої кількості води й енергії у глобальному масштабі передбачається розвиток інноваційного процесу, що проголошено Міжнародною комісією по іригації та дренажу на період до 2030 року [12]; з метою збереження конкурентної переваги, ЄС має значно збільшити масштабне розгортання та демонстрацію нових технологій у різних секторах та на єдиному ринку, створюючи нові інноваційні ланцюги створення вартості [2]; прогресивні інновації сприяють розвитку спроможностей іригаційного комплексу України [14] тощо. Запровадження міжгалузевої та міждисциплінарної співпраці на підставі інноваційних механізмів стає ключовим моментом в досягненні перспективних цілей. Саме інноваційний підхід, який ґрунтується на перевагах новітніх шляхів з урахуванням зменшення ризиків дозволяє реалізувати заходи досягнення поставленої мети. Наріжним каменем впровадження інновацій у сферу зрошення та дренажу України стає не виживання суспільства і держави в складних умовах погіршення клімату та ведення війни - а досягнення історичної місії народу та держави України через збереження та оптимальне використання всіх наших природних ресурсів, перш за все водних ресурсів та відповідної меліоративної інфраструктури.

Зазначимо, що сучасне використання потенціалу зрошуваних систем оцінюється як вкрай незадовільне [14]. Втрати води з гідротехнічних споруд України складають 80 млн. м3 води в рік. [13]. Загальна зношеність елементів інженерної інфраструктури меліоративних систем внаслідок їхньої довготривалої експлуатації складає 60%, з них на міжгосподарській мережі 55%, на внутрішньогосподарській — 65% [11]. За рівнем раціонального використання водних ресурсів та якості води Україна, за даними ЮНЕСКО, серед 122 країн світу посідає 95 місце [8]; актуальною в Україні залишається проблема раціоналізації водокористування при зрошенні, адже за умов «традиційної» меліорації непродуктивні втрати води доходять до 40%. Зменшення втрат води хоча б на 1% у рік дозволить провести додатковий полив на 40 тис. га сільськогосподарських земель [7].

ОСНОВНІ ТЕОРЕТИЧНІ ТА ПРАКТИЧНІ ПОЛОЖЕННЯ. BASIC THEORETICAL AND PRACTICAL PROVISION

З метою подолання вказаних вище недоліків потрібні поглиблені дослідження запровадження механізмів інновацій у розвиток та управління системами зрошення та осушення. Викладемо результати вивчення інноваційних механізмів розвитку зрошення і дренажу в Україні з використанням досвіду інновацій у сфері управління водними ресурсами та меліорацією земель в країнах з розвиненою ринковою економікою.

Наразі до сфери управління Держрибагентства України прийнято 143 зрошувальні системи, площа обслуговування яких дорівнює 1053,9 тис. га та 297 осушувальних систем, площа обслуговування яких дорівнює 390,4 тис. га; планується зростання мережі організацій водокористувачів (ОВК) з 60 до 110 організацій тощо [14].

У табл. 1 систематизовано головні складові інноваційного механізму регулювання та управління розвитком зрошення і дренажу в Україні.

Таблиця 1. Основні напрями інноваційного механізму регулювання та управління розвитком зрошення і дренажу в Україні

Напрями	Розкриття змісту напрямів
Мета	Утворення та реалізація стійкої інноваційно-інвестиційної моделі випереджувального розвитку аграрного сектора, досягнення високої еколого-економічної ефективності на меліорованих землях, заохоченні до екологічних нововведень і забезпеченні формування попиту на інновації [10]
Визначна роль інновацій	Забезпечення стимулювання оптимізації використання води; запровадження інновації на всіх стадіях водного циклу, забезпечення поточної рентабельності сільськогосподарської діяльності та майбутньої конкурентоспроможності водокористувачів [10]**.**
Державне регулювання інноваційно-інвестиційної політики	Створення інфраструктури ринку інновацій, розвиток системи трансферу технологій; створення організаційно-економічного механізму регулювання та управління розвитком зрошення і дренажу в Україні на основі інновацій, формування холдингових компаній на базі державних водогосподарських підприємств як ефективної форми нарощення інвестиційного потенціалу [10].
Види інновацій:	**техніко-технологічні інновації:** технології вирощування сільськогосподарських культур за оптимізації різних способів

	поливу та режимів зрошення, систем удобрення, обробітку ґрунту та захисту рослин; автоматизовані системи керування зрошенням із застосуванням інноваційних технологій; моніторинг та контроль ерозійних процесів, моделювання, симуляція та аналізу тенденцій, оцінювання вологості ґрунту у галузі точного землеробства для водозберігаючих способів зрошення – ефективних видів краплинного та низьконапірного дощування [20], новітні та інноваційні технології зрошення [9,14], системи точного та низьковуглецевого землеробства, мінімального та нульового обробітку ґрунту [9,22], застосування електрохімічно активованих екологічно безпечних сольових розчинів для підвищення функціонування систем зрошення та ефективності рослинництва [17]; **організаційно-управлінські інновації:** інтеграція нових форм обслуговування меліоративних систем (діяльність ОВК) з інфраструктурою водокористування; системи автоматизованого управління/автоматизації управління [14], інформаційні системи підтримки прийняття управлінських рішень заходи зі створення потужностей для забезпечення координації та управління процесом; навчання фахівців [15].
Реалізація організаційних заходів підтримки інновацій	Удосконалення організаційно-економічних взаємовідносин між сільськогосподарськими товаровиробниками та водогосподарськими організаціями, збільшення обсягів надходження інвестицій, поліпшення технічного стану зрошуваних систем, зокрема шляхом їх реконструкції й технічного переоснащення з дотриманням вимог енерго- та ресурсоощадності й екологічної безпеки; прискорення запровадження інноваційних технологій, зокрема застосування краплинного зрошення для підвищення еколого-економічної ефективності використання поливній води; застосування консорціумного кредитування та гарантування повернення великих сум кредитів; кооперування сільгоспвиробників різних організаційно-правових форм господарювання для здійснення спільних інвестицій і мінімізації ризиків [10]; інструменти «першого збитку», коли державні установи беруть на себе початкові ризики, щоб заохотити участь приватного сектора [4], облік обсягів води на зрошення, врахування якості води та послуг, врахування вартості енергоносіїв [14].
Забезпечення інновацій джерелами фінансування	Фінансування інвестицій у водне господарство у повному обсязі, кредитне страхування інноваційних розробок та можливих ризиків у процесі інноваційної діяльності, створення спеціальних інноваційно-інвестиційних банків для концентрації капітальних вкладень, впровадження прогресивних форм інвестиційного забезпечення (кошти регіональних водних фондів, інститутів спільного інвестування, міжнародних фінансово-кредитних установ, позик урядів розвинених країн тощо), формування державного капіталу на принципах державно-приватного партнерства, банківське кредитування,

	лізинг; створення інноваційних об'єднань виробників сільськогосподарської продукції на меліорованих землях у межах області чи кількох районів і створення на основі цих об'єднань акціонерних товариств, венчурних сільськогосподарських підприємств, агрокомплексів, які зможуть проводити більш ефективну політику щодо залучення коштів як вітчизняних, так й іноземних інвесторів [10]
Створення системи економічного стимулювання грунтоохоронної інноваційної діяльності підприємств	Надання податкових пільг суб'єктам підприємницької діяльності, що придбали інновації та при інвестуванні ними власних коштів у наукові дослідження для розробки екологічних інновацій у меліоративному комплексі; удосконалення організаційно-економічного механізму взаємодії суб'єктів процесу залучення прямих іноземних інвестицій у напрямі використання важелів нефіскального характеру [10]
Формування системи тарифоутворенн я на послуги з подачі/відведенн я води для зрошення та дренажу	Фінансування витрат на управління, обслуговування, експлуатацію та розвиток зрошення і дренажу на основі системи тарифів; усунення перешкод відновлювати зрошувальну мережу меліоративних систем України через низькі тарифи на подачу води [7]; використання позитивного досвіду надання послуг подачі/відведення води на інноваційній основі [5]; адаптація ставок тарифів до змін у ринковому середовищі, розгляд тарифів як джерела задоволення потреби у значних інвестиціях в інфраструктуру, створення тарифної структури, яка включає експлуатаційні витрати та інвестиції; необхідність перегляду тарифів для адаптації до нових напрямів використання води [3]; координація системи тарифів при подачі/відведення води оператором з тарифами на послуги ОВК
Вдосконалення наукових засад інновацій у розвитку зрошення та дренажу	Врахування високого рівня наукоємності сфери водокористування [19]; проведення фундаментальних та прикладних досліджень; розробка гідрологічних критеріїв у тих типологія [12], які надають кращі можливості; розкриття методичних і прикладних аспектів формування та впровадження інноваційної стратегії сталого ведення господарської діяльності на зрошуваних землях в умовах зміни клімату, військової агресії рф та післявоєнної відбудови, обґрунтування економічної доцільності їх впровадження при веденні зрошуваного землеробства [9], розробка основ водного, екологічного та енергетичного аудитів для обґрунтування ефективних інноваційних рішень
Вирішення практичних завдань реалізації	Поетапне (*step-by-step*) втілення системи інноваційно-інвестиційного забезпечення меліорації [10]
Врахування практики визначення першочергових	Залучення водних ресурсів р. Дунай у проекти з відновлення зрошувальних систем в південних областях України [20], інновації при вирощуванні вигідних для господарства культур: оливки, фісташки, хурма, лимони, трюфелі [6].

об'єктів запровадження інновацій	

Дослідниками зазначається потреба реалізації інноваційної моделі економіки, розвиток власного науково-технічного потенціалу цілісної інноваційної інфраструктури [16].

Інноваційний тип виробництва відповідає сучасним вимогам до надання послуг з подачі води (рівень якості послуг, строки виконання замовлень, реакція за зміни попиту ринку, система управління, задоволення вимог до економічності тощо) [8]. У розробках враховано характерні риси інновацій – для розробці та впровадження нововведень необхідно витрачання певних коштів; єдиний інноваційний підхід посилить координацію (взаємодію) та зв'язок складових інноваційного механізму.

Інноваційний шлях розвитку дозволяє зменшити обсяги капітальних вкладень для відновлення об'єктів систем, зменшити фінансові витрати, втрати ресурсів, значно скоротити строки окупності капітальних вкладень. При пріоритеті стратегічних інтересів держави та бізнес-інтересів учасників (агентів) можливо досягти реалізації стійкої моделі випереджувального розвитку аграрного сектора через розвиток зрошення та дренажу на підставі застосування інноваційних інструментів.

Дослідниками розглядаються пропозиції надання послуг із зрошення на основі інновацій. Встановлено, що впровадження інноваційних ресурсозберігаючих технологій (водозберігаючі екологічно безпечні режими зрошення, внесення добрив з поливною водою малими нормами, проведення поливів низьконапірними дощувальними машинами, оптимізація роботи насосносилового обладнання) забезпечить зниження рівня споживання води на 15%, електроенергії — на 10%, що істотно послабить техногенне навантаження на довкілля та підвищить економічну ефективність землеробства на меліорованих землях [22]. Планується створення умов для ефективного землекористування на основі інноваційних технологій зрошення [21].

Інноваційний підхід при прийнятті рішень в управлінні зрошенням та осушенням спрямований на забезпечення інтересів всіх зацікавлених сторін: суспільства, операторів об'єктів меліоративних систем державної власності, ОВК, водокористувачів (фермерів, господарств, корпорацій, тощо). При цьому здійснюється використання потенціалу інновації від дослідницьких стадій до комерціалізації досліджень. Перехід до сталої моделі зрошення, розробка управлінських рішень на основі врахування небезпеки від природних явищ, запровадження інноваційного підходу боротьби з опустелюванням, адекватна реакція на екстремальні погодні умови виходячи з прогнозів змін клімату, використання результатів наукових досліджень, проведення цільових аудитів для розробки ефективних інноваційних рішень, уникнення надмірного споживання води, переміщення вирощування продукції у зони з гарантованою забезпеченністю водою, підтримка вирощування на зрошуваних землях продукції з високою доданою вартістю та вирощування органічної продукції, утворення механізмів адаптації ставок тарифів для умов ринку, стимулювання певної гнучкості у бізнес-моделях за умови зростання вартості енергії, забезпечення динамічності, обґрунтованості і прозорості встановлення ставок тарифів при відновленні на новій основі зрошувальних систем та сільськогосподарських угідь після розмінування територій, сприяння енергоефективності та стимулювання запровадження енергоефективних технологій у зрошенні тощо.

Вихід бачиться у широкому розвитку інновацій та отриманні ефекту від "спонукання" до інновації, використанні революційних ідей щодо відновлення та розвитку зрошення і дренажу в Україні в умовах змін клімату, війни та післявоєнної відбудови; реалізації нових можливостей, сприянні перетворенням для досягненні чітко встановленої мети, дотриманні цільового характеру інновацій у реалізації проектів та проведення моделювання об'єктів інфраструктури через формування інноваційної інфраструктури; потрібно здійснити перехід від інновацій у окремі елементи водного циклу (способи зрошення та осушення, системи керування зрошенням/осушенням, експлуатація систем, підвищення якості водних ресурсів, економії енергоресурсів, технології вирощування культур) до використання інтегрованого підходу в управлінні комплексом зрошення та дренажу із дотриманням регламентів/показників віддачі від меліорованих земель; формування законодавчої бази, податкових пільг для впровадження більш стійких технологій і збільшення інвестицій у інновації та ін.

В Україні за об'єктивною оцінкою потенціалу зрошення та дренажу із застосуванням інноваційного підходу - постійного зрошення потребують 18 млн. га, сумарні можливості щодо відновлення площ зрошення на підконтрольній Україні території шляхом реалізації проектів з реконструкції та модернізації наявних зрошувальних мереж становлять понад 700 тис. га., передбачається залучення водних ресурсів р. Дунай у проекти з відновлення наявних в південних областях зрошувальних систем; очікуватимуться також заходи з відновлення дренажних систем у зоні Полісся - на першому етапі робіт (до 2030 року) потрібно відновити роботу наявних дренажних систем в режимі подвійного регулювання на загальній площі не менше 350 тис. га. [18].

ОЦІНКА РЕЗУЛЬТАТІВ ДОСЛІДЖЕННЯ. RESEARCH RESULTS AND THEIR EVALUATION

В результаті дослідження встановлено значення та запропоновано основні складові механізму розвитку зрошення та дренажу України на основі інновацій.

ВИСНОВКИ. CONCLUSION

Інноваційну парадигму механізму розвитку зрошення та дренажу в Україні необхідно покласти в основу водної політики - управління водними ресурсами та інфраструктурою зрошення та дренажу України.

СПИСОК ВИКОРИСТАНОЇ ЛІТЕРАТУРИ. REFERENCES

1. Andrés-Doménech Ignacio. El marco regulatorio para implantar sistemas urbanos de drenaje sostenible: ¿es suficiente? P. 26-27. Agua-español Agua y Medio Ambiente Revista mensual | 5 de octubre de 2021 URL: | Nº88 fd57fc76c05914e1551d54caf32e4202_agua.pdf
2. Communication from the Commission to the European parliament, the European council, the council, the european economic and social committee and the committee of the regions (PDF). Архів оригіналу (PDF) за 24 жовтня 2020. Процитовано 29 січня 2020. URL: ttps://web.archive.org/web/20201024175024/https://ec.europa.eu/info/sites/info/files/european-green-deal-communication_en.pdf
3. "Con el actual ritmo inversor se tardarán 12 años en abordar las necesidades previstas para 2027" Agua 2024.04.06 URL: https://s03.s3c.es/pdf/7/4/740e51a071b828a7826f00413f08a3a7_agua.pdf
4. ¿David contra Goliath? La COP29 ofrece un aperitivo de la nueva geopolítica mundial p. 30-31/ Agua-123-dec.2024 | Agua y Medio Ambiente 3 de diciembre de 2024 | Nº123Revista mensual elEconomista.es URL: https://s03.s3c.es/pdf/2/1/21696015e1c7837c81948471abff5003_agua.pdf

5. How innovation and collaboration will secure water security for all (2024) URL: https://www.weforum.org/stories/2024/01/india-shows-how-innovation-and-collaboration-will-secure-a-sustainable-future-for-water

6. Minaya Ángel.La apuesta de España por el pistacho: del desafío al liderazgo Agro Revista mensual | 15 de marzo de 2025 | Nº107 elEconomista.es URL: https://s03.s3c.es/pdf/8/6/866680e2c73e7a2180e36e1cf240f86f_agro.pdf

7. Інноваційні трансформації аграрного сектора економіки: монографія/ [О.В.Шубравська, Л.В. Молдаван, Б.Й.Пасхавер та ін.]; за ред. д-ра. екон. наук О.В.Шубравської; НАН України, Ін-т екон. та прогнозув. - К., 2012. – 496 с.: табл. рис.

8. Коренюк П. І., Федулова С. О. Економіка природокористування. [Навчальний посібник]. – Дніпропетровськ: Акцент ПП, 2014. – 274 с. ISBN 978-617-7109-59-3

9. Матяш Т.В., Бутенко Я.О., Попов В.М., Сорока Н.В., Салюк А.Ф., Смірнов А.М. Інноваційні підходи до візуалізації водопотреби сільськогосподарських культур на основі інформаційних технологій Вода для майбутнього: управління, збереження, інновації: Збірник тез XIII Міжнародної науково-практичної конференції, м. Київ, 25-26 березня 2025 року с.222-224. https://mivg.iwpim.com.ua/files/Water_day_tezy2025.pdf
DOI: https://doi.org/10.31073/mivg2025

10. Меліорація ґрунтів (систематика, перспективи інновації): колективна монографія (за ред. В.А. Балюка, М.І. Ромащенка, Р.С. Трускавецького).- Херсон: Гринь Д.С., 2015. – 668 с.

11. Міністерство екології та природних ресурсів України, Звіт про стратегічну екологічну оцінку Проекту стратегії зрошення та дренажу в Україні до 2030 року. Режим доступу: https://menr.gov.ua/news/32835.htm

12. Нечипоренко О. М. Трансформація систем управління в зрошуваному землеробстві: монографія. Київ: ННЦ «ІАЕ», 2018. – 392 с.

13. Орлінська О.В., Левковський І.В. Моніторинг технічного стану регулюючого басейну Калинівської зрошувальної системи Синельниківського району Дніпропетровської області. Матеріали регіональної науково-практичної інтернет-конференції "Зрошуване землеробство: сьогодення, проблеми, перспективи" (2-3 листопада 2017 р.) [До 80-річчя професора Ківера В.Х.]. – Дніпро : ДДАЕУ, 2017. 119-123 – 130 с.

14. План розвитку іригаційного комплексу України до 2050 р. Кабінет Міністрів України Розпорядження від 25 березня 2025 р. № 280-р Київ https://www.kmu.gov.ua/npas/pro-zatverdzhennia-dovhostrokovoho-planu-rozvytku-iryhatsiinoho-kompleksu-ukrainy-do-2050-roku-280r-250325

15. Поліщук В., Усатий С., Матяш Т., Салюк А., Коваленко І. Напрями впровадження інновацій при зрошенні Вода для майбутнього: управління, збереження, інновації: Збірник тез XIII Міжнародної науково-практичної конференції, м. Київ, 25-26 березня 2025 року с.165-168. https://mivg.iwpim.com.ua/files/Water_day_tezy2025.pdf
DOI: https://doi.org/10.31073/mivg2025

16. Рижов Володимир. Світ, інновації і ми. Урядовий кур'єр, 07 лютого, 2003,

17. Ромащенко М.І., Конаков Б.І., Никитюк О.А., Пантелєєв В.П., Томашевський О.В., Поліщук В.В., Коваленко І.О. Інноваційні технології з синергічним ефектом як складова розвитку зрошення в Україні Вода для майбутнього: управління, збереження, інновації: Збірник тез XIII Міжнародної науково-практичної конференції, м. Київ, 25-26 березня 2025 року с.328-331. https://mivg.iwpim.com.ua/files/Water_day_tezy2025.pdf
DOI: https://doi.org/10.31073/mivg2025

18. Ромащенко М.І., Яцюк М.В., Шатковський А.П., Усатий С.В., Поліщук В.В., Сайдак Р.В. Перспективи відновлення зрошення та дренажу в Україні в умовах воєнного стану Вода для майбутнього: управління, збереження, інновації: Збірник тез XIII Міжнародної науково-практичної конференції, м. Київ, 25-26 березня 2025 року с.239-241. https://mivg.iwpim.com.ua/files/Water_day_tezy2025.pdf DOI: https://doi.org/10.31073/mivg2025

19. Ромащенко М.І. та ін. Проблеми та основні напрями розвитку зрошення та дренажу в Україні в умовах змін клімату. Меліорація і водне господарство, 2020, № 1, с 56-67.

20. Ромащенко М.І., Балюк С.А., Вергунов В.А., Вожегова Р.А., Жовтоног О.І., Рокочинський А.М., Тараріко Ю.О., Трускавецький Р.С. Сталий розвиток меліорації земель в Україні в умовах змін клімату DOI https://doi.org/10.32848/agrar.innov.2020.3.10 https://journals.indexcopernicus.com/api/file/viewByFileId/1193097

21. Стратегія розвитку Херсонської області на період 2021 - 2027 років https://khoda.gov.ua/image/catalog/files/%20%D1%80%D0%BE%D0%B7%D0%B2%D0%B8%D1%82%D0%BA%D1%83%20%D0%A5%D0%B5%D1%80%D1%81.%D0%BE%D0%B1%D0%BB.%D0%BD%D0

%B0%20%D0%BF%D0%B5%D1%80%D1%96%D0%BE%D0%B4%202021-
2027%20%D1%80%D0%BE%D0%BA%D1%96%D0%B2.pdf

22. Хвесик М. А., Яроцька О. В., Мандзик В. М., Ковальчук-Шамрило К. А. Оптимізація водноресурсного
забезпечення економіки як важлива складова інноваційнотехнологічного розвитку. Рада по вивченню
продуктивних сил України НАН України. стор. 2-9 URL: http://www.agrosvit.info/pdf/3_2010/2.pdf

INTEGRATION OF GREEN ECONOMY PRINCIPLES INTO AGRICULTURAL ENTERPRISES: ASSESSMENT OF DYNAMICS BY KEY INDICATORS

Pereguda Yuliia
Doctor of Economics, Associate Professor,
Associate Professor of Department of Global Economic,
National University of Life and Environmental Sciences of Ukraine (Kyiv, Ukraine)
Deputy Head of the Department of Organization of Tourism Activities,
Department of Tourism Organization of the Educational and Scientific Institute of Management,
Economics and Business (NNIUEB)
Interregional Academy of Personnel Management (Kyiv, Ukraine)
e-mail: julilla.pereguda@gmail.com
ORCID: https://orcid.org/0000-0002-1434-2509

ABSTRACT

This article examines the integration of green economy principles into Ukrainian agricultural enterprises through the assessment of key indicators from 2015 to 2023. The study reveals positive trends in resource efficiency, partial progress in emission reduction, and limited adoption of circular practices. It highlights the need for targeted policy support, investment in sustainable technologies, and improved reporting mechanisms to accelerate green transformation in the sector.

Keywords: green economy, agricultural enterprises, resource efficiency, greenhouse gas emissions, circular practices

АНОТАЦІЯ

У статті проаналізовано інтеграцію принципів зеленої економіки в діяльність аграрних підприємств України на основі динаміки ключових показників за 2015–2023 роки. Визначено позитивні зрушення у ресурсоефективності, часткове скорочення викидів та низький рівень впровадження циркулярних практик. Акцент зроблено на потребі цільової політики, інвестицій у сталу модернізацію та покращення звітності.

Ключові слова: зелена економіка, аграрні підприємства, ресурсоефективність, викиди парникових газів, циркулярні практики

INTRODUCTION

The transition towards a green economy has become an essential global priority in the context of sustainable development and climate change mitigation. Agriculture, as a resource-intensive and environmentally sensitive sector, plays a pivotal role in achieving ecological balance and long-term economic resilience. In recent years, the integration of green economy principles into the operations of agricultural enterprises has gained increasing attention, especially in countries undergoing structural transformation and environmental modernization.

This study aims to assess the dynamics of key indicators that reflect the implementation of green economy practices in the agricultural sector. Emphasis is placed on resource efficiency, environmental impact mitigation, adoption of circular practices, and sustainability reporting. The relevance of this research lies in identifying trends, bottlenecks, and potential growth areas that can inform evidence-based policy-making and strategic planning for the agri-food industry.

By analyzing quantitative data and qualitative shifts, this paper contributes to a deeper understanding of how agricultural enterprises adapt to the principles of the green economy, and

what implications this transformation has for national and regional sustainable development agendas.

LITERATURE REVIEW

The integration of green economy principles into agriculture has attracted significant scholarly attention over the past two decades, especially within the frameworks of sustainable development and climate policy. The concept of the green economy, broadly defined by the United Nations Environment Programme (UNEP, 2011), emphasizes low-carbon, resource-efficient, and socially inclusive growth. In agriculture, this implies shifting towards production models that reduce environmental impact, enhance soil and water conservation, and promote biodiversity.

Several studies have highlighted the role of sustainable agricultural practices—such as organic farming, agroecology, precision agriculture, and circular approaches—in aligning agricultural enterprises with green economy goals (Altieri et al., 2015; Tittonell, 2020). These practices are not only environmentally beneficial but also economically viable in the long term, particularly when supported by policy incentives and access to green technologies.

Empirical research has shown that the adoption of green economy elements in agriculture correlates with improvements in key sustainability indicators, including energy and water use efficiency, greenhouse gas emissions, and waste management (Pretty et al., 2018). In the European context, the EU Green Deal and the Farm to Fork Strategy have created institutional mechanisms to facilitate this transition (European Commission, 2020). For countries with transitioning economies, such as Ukraine, the challenge lies in balancing productivity with environmental stewardship, which requires targeted investments, regulatory alignment, and access to innovation.

Studies also underscore the importance of sustainability reporting and environmental accounting in assessing the level of green transformation among agricultural enterprises (FAO, 2021). Indicators such as eco-efficiency, resource productivity, and environmental performance metrics are increasingly used to monitor progress and guide strategic decision-making (OECD, 2019). However, there remains a gap in consistent data collection, particularly in the Global South and post-Soviet economies, where institutional and infrastructural limitations persist.

Overall, the literature suggests a growing convergence between the goals of agricultural modernization and the imperatives of environmental sustainability. Yet, the extent and pace of this integration vary significantly across regions and depend heavily on national policy frameworks, stakeholder engagement, and financial mechanisms.

THEORETICAL AND PRACTICAL PROVISION

The integration of green economy principles into agricultural enterprise management is grounded in a broad interdisciplinary theoretical framework that encompasses environmental economics, sustainable agriculture, institutional theory, and innovation systems. Theoretical foundations of the green economy suggest that economic activities must operate within planetary boundaries, optimize natural resource use, and internalize environmental externalities (Costanza et al., 2014). In agriculture, this translates into adopting farming systems that are both productive and ecologically sound.

From a methodological perspective, the assessment of green economy integration relies on a system of indicators that capture environmental performance, resource efficiency, and sustainability outcomes at the enterprise level. These include indicators such as energy intensity, water usage per unit of output, greenhouse gas emissions, use of organic inputs, and implementation of sustainability reporting mechanisms. International organizations such as the

FAO, OECD, and UNEP have contributed to the development of harmonized metrics for tracking progress in green transformation.

In practical terms, the implementation of green economy principles in agricultural enterprises involves multiple dimensions: technological modernization (e.g., adoption of precision farming and renewable energy), institutional adaptation (e.g., compliance with environmental standards and green certification), and behavioral change among producers and managers. The success of these transformations depends not only on access to capital and innovation but also on regulatory incentives, technical capacity, and market readiness.

In the Ukrainian context, the practical realization of these principles is shaped by both external factors—such as alignment with EU environmental policy—and internal challenges, including fragmented land ownership, outdated infrastructure, and limited access to sustainable technologies. Nevertheless, positive dynamics have been observed in certain regions and among progressive agricultural enterprises that demonstrate high levels of eco-efficiency, biodiversity preservation, and resource optimization.

Overall, the theoretical provisions support the feasibility of green transformation in agriculture, while practical applications underscore the need for systemic support mechanisms to facilitate transition across diverse agricultural systems.

METHODOLOGY

The objective of this study is to assess the integration of green economy principles into the operations of agricultural enterprises by analyzing the dynamics of key sustainability indicators over a defined period. The study seeks to identify both progress and gaps in adopting environmentally sound practices and to provide evidence-based recommendations for enhancing green transformation in the agricultural sector.

To achieve the stated objective, the following research objectives were formulated:

to systematize theoretical approaches to the integration of green economy principles in agriculture;

to identify a set of key indicators reflecting environmental, economic, and resource efficiency dimensions relevant to agricultural enterprises;

to evaluate the temporal dynamics of these indicators using statistical and empirical data;

to analyze the correlation between green practices and performance outcomes in agricultural enterprises.

to provide strategic recommendations for enhancing green integration at the enterprise and policy levels.

Research Methods

The research employs a mixed-methods approach, combining quantitative and qualitative tools. The following methods were used: comparative analysis (to compare indicator dynamics across time periods and regions); statistical analysis (to process time-series data on environmental and economic indicators, including trend analysis and correlation); content analysis (to examine regulatory documents, sustainability reports, and corporate disclosures for the presence and depth of green economy integration);

Data sources include national statistical databases, enterprise reports, sectoral studies, and international sustainability metrics (FAO, OECD, Eurostat). The time frame of analysis covers the period from 2015 to 2023, ensuring an adequate representation of policy shifts and implementation trends.

RESEARCH FINDINGS

The empirical analysis revealed a gradual but uneven integration of green economy principles across agricultural enterprises during the 2015–2023 period. The dynamics of key indicators showed improvements in certain areas, while others exhibited stagnation or fluctuating trends, reflecting systemic barriers and differing levels of enterprise adaptation.

A positive trend was observed in the reduction of energy and water consumption per unit of agricultural output in a majority of enterprises. Between 2015 and 2023, average energy intensity decreased by 18%, and water use efficiency improved by approximately 12%, particularly among medium-sized producers implementing precision agriculture technologies. However, small-scale enterprises continued to struggle with outdated infrastructure and limited access to green technologies.

The analysis of energy intensity and water use efficiency in Ukraine's agricultural sector from 2015 to 2023 indicates a gradual improvement in resource efficiency, particularly among medium and large enterprises.

Between 2015 and 2023, the agricultural sector in Ukraine demonstrated a steady improvement in resource efficiency, particularly in terms of energy and water use per unit of output. Energy consumption per ton of agricultural production declined by approximately 18%, indicating gradual progress in the adoption of energy-saving technologies and more efficient production processes. This trend was especially evident among medium and large enterprises that have increasingly implemented precision agriculture practices and upgraded their technical base.
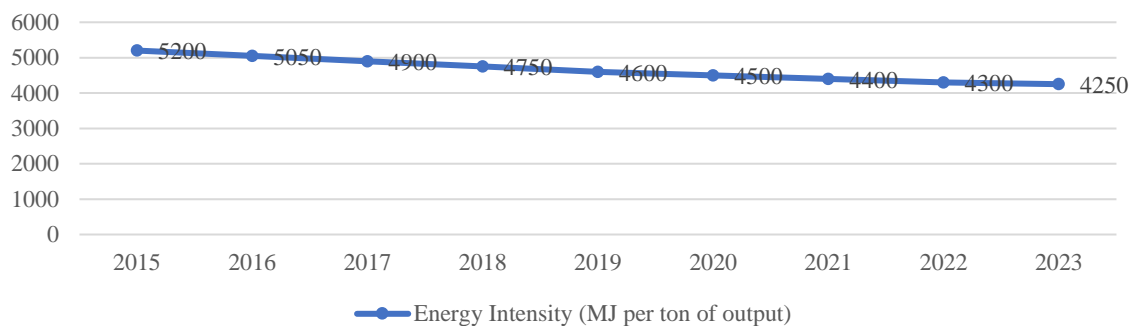
Figure 1. Dynamics of Energy Intensity in Ukrainian Agriculture (2015–2023).
Source: FAO, 2022; SSSU, 2023.

Simultaneously, water use efficiency improved by nearly 27% over the same period. This reduction in water consumption per unit of output reflects a shift towards more sustainable irrigation methods and better water management systems, including the introduction of moisture-saving technologies and optimized crop rotation schemes. These advancements collectively point to a positive trajectory in the sector's environmental performance, though disparities remain across different enterprise sizes and regions. Small-scale producers, in particular, continue to face challenges related to technological access, infrastructure quality, and investment capacity, which may slow down the pace of wider adoption of green economy practices.
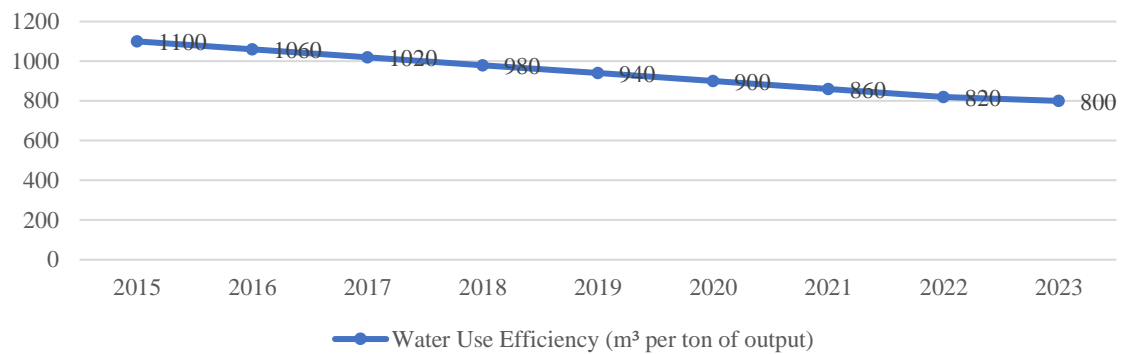
Figure 2. Dynamics of Water Use Efficiency in Ukrainian Agriculture (2015–2023).
Source: FAO, 2022; SSSU, 2023.

The share of certified organic land increased modestly from 0.9% to 1.6% (Organic.info, 2024) of total agricultural land during the study period. Enterprises engaging in crop diversification, agroforestry, and reduced pesticide use demonstrated higher biodiversity indexes and resilience to climatic stress. Nonetheless, the expansion of organic practices remains constrained by low consumer awareness, limited market infrastructure, and weak state support mechanisms.

Greenhouse gas (GHG) emissions per unit of production showed a marginal decline (approx. 6%) over the observed period, mainly due to improvements in manure management and fertilizer optimization in livestock operations. However, progress remains insufficient to meet EU-aligned sustainability targets, indicating a need for more rigorous implementation of climate-smart agricultural practices.

Between 2015 and 2023, Ukraine's agricultural sector exhibited fluctuations in greenhouse gas (GHG) emissions, reflecting both gradual technological improvements and the influence of external stressors such as economic disruption and the full-scale war. Overall, there is a moderate downward trend in emissions per unit of production, indicating progress toward climate-smart agricultural practices and improved environmental performance.
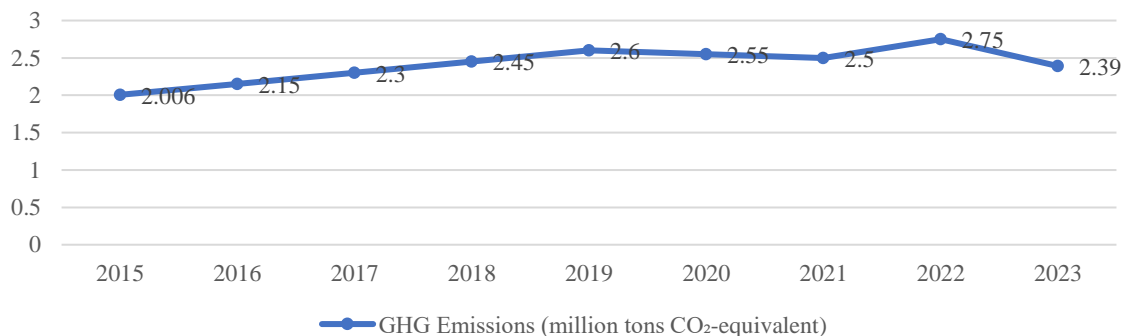
Figure 3. Greenhouse Gas Emissions from Ukraine's Agricultural Sector (2015–2023).
Source: SSSU, 2024.

The dynamics of greenhouse gas (GHG) emissions from Ukraine's agricultural sector between 2015 and 2023 reveal a nuanced trajectory shaped by both structural adjustments and external shocks. From 2015 to 2019, emissions gradually increased—from 2.006 to 2.600 million tons of CO_2-equivalent—reflecting intensified agricultural production, particularly in livestock and grain sectors, with relatively slow adoption of emission-reducing technologies.

Starting in 2020, a slight decline in emissions was observed, with figures dropping to 2.550 million tons in 2020 and 2.500 million tons in 2021. This shift may be attributed to improvements in fertilizer application practices, manure management, and more widespread implementation of precision agriculture techniques among large-scale producers. However, the gains were partially offset in 2022, when emissions spiked to 2.747 million tons—likely influenced by logistical disruptions, unsystematic land use, and stress on supply chains caused by the full-scale war.

By 2023, emissions declined again to 2.387 million tons, suggesting a partial recovery of control over agricultural processes and a renewed focus on climate-adaptive practices. Despite these fluctuations, the overall trend points to only a modest reduction in GHG emissions over the nine-year period. This underscores the need for more systemic interventions, including financial incentives for emission-reducing technologies, enhanced climate policy alignment with EU frameworks, and capacity-building for sustainable land and livestock management, particularly at the level of small and medium-sized agricultural producers.

CONCLUSIONS

The conducted research confirms that the integration of green economy principles into the operations of agricultural enterprises in Ukraine is progressing, yet remains uneven across key dimensions and enterprise types. Positive trends are evident in the gradual improvement of energy and water use efficiency, modest expansion of organic agricultural practices, and the initial uptake of climate-smart technologies. However, these advancements are primarily concentrated among larger and internationally connected enterprises with better access to capital, innovation, and external markets.

The assessment of greenhouse gas emissions reveals a partial decoupling of agricultural output from environmental impact, although the overall reduction remains limited and vulnerable to external shocks such as war and economic instability. Moreover, circular economy practices and sustainability reporting are still underdeveloped, particularly among domestic-oriented and small-scale producers.

The findings underscore several critical implications. First, targeted policy interventions and financial support mechanisms are necessary to scale up green transformation across the agricultural sector. Second, investment in education, digital infrastructure, and certification systems can accelerate the adoption of environmentally sound practices. Third, the establishment of a unified monitoring and reporting framework based on clear sustainability indicators would strengthen transparency and accountability.

In conclusion, while the foundations for green modernization in agriculture are being laid, Ukraine's agri-food sector requires strategic coordination, institutional support, and inclusive incentives to realize the full potential of green economy integration and contribute meaningfully to national and global sustainability goals.

REFERENCES

1. Altieri, M. A., Nicholls, C. I., Henao, A., & Lana, M. A. (2015). Agroecology and the design of climate change-resilient farming systems. *Agronomy for Sustainable Development, 35*(3), 869–890. https://doi.org/10.1007/s13593-015-0285-2
2. European Commission. (2020). *A Farm to Fork Strategy for a fair, healthy and environmentally-friendly food system*. https://ec.europa.eu/food/farm2fork_en
3. FAO. (2021). *Tracking progress on food and agriculture-related SDG indicators 2021*. Food and Agriculture Organization of the United Nations. https://www.fao.org/sdg-progress-report/en/
4. OECD. (2019). *Agri-environmental indicators: Environmental performance of agriculture in OECD countries since 1990*. OECD Publishing. https://doi.org/10.1787/9789264312039-en

5. Pretty, J., Benton, T. G., Bharucha, Z. P., Dicks, L. V., Flora, C. B., Godfray, H. C. J., ... & Wratten, S. (2018). Global assessment of agricultural system redesign for sustainable intensification. *Nature Sustainability, 1*(8), 441–446. https://doi.org/10.1038/s41893-018-0114-0
6. Tittonell, P. (2020). Ecological intensification of agriculture—Sustainable by nature. *Current Opinion in Environmental Sustainability, 45*, 1–7. https://doi.org/10.1016/j.cosust.2020.01.007
7. UNEP. (2011). *Towards a green economy: Pathways to sustainable development and poverty eradication*. United Nations Environment Programme. https://www.unep.org/resources/report/towards-green-economy
8. Food and Agriculture Organization of the United Nations. (2022). *FAOSTAT: Inputs and resources – Energy and water use in agriculture*. https://www.fao.org/faostat/en/#data/ER
9. State Statistics Service of Ukraine. (2023). *Statistical Yearbook of Ukraine 2022: Agriculture, Forestry and Fisheries*. Kyiv: State Statistics Service of Ukraine. https://ukrstat.gov.ua/
10. OrganicInfo.ua. (2024). *Organic production of Ukraine for 2016–2023 (land certified)*. Retrieved from https://organicinfo.ua/en/infographics/organic-land-2016-2023/​:contentReference{index=1}

THE IMPACT OF DIGITAL MARKETING CAMPAIGNS ON CONSUMER BUYING BEHAVIOR: A CASE STUDY OF DIALOG AXIATA IN SRI LANKA

Meththa Harshani Ranasinghe Arachchige
Riga, Latvia
Baltic International Academy
Entrepreneurship Management (Bachelor Program)
harsheesinghe@gmail.com
Supervisor: Dr. oec. Alla Iljina

ANOTĀCIJA

Šis pētījums vārsta digitālā mārketinga kampaņu iespaidu patērētāju pirkšanas uzvedībai lietojot Dialog Axiata pieredzi Šrilankā. Pētījuma iznākumi pierāda, ka kādreizējas digitālas stratēģijas ieguvein patērētāju izvēle, attēlojot galvenos tendencas un uzvedības paslienas mainīgās. Datumi parāda tuva saistību starp mērķētām kampaņām un klienta iesaistības un pircības.

Atslēgvārdi: Patērētāju uzvedība, Digital Marketing, Dialogs Axiata, Mārketinga kampaņas, Šrilanka

ABSTRACT

This study examines the influence of online promotional campaigns on consumer purchasing behavior through a case study of Dialog Axiata in Sri Lanka. The research identifies how digital strategies influence consumer behavior and trends, which emerge and change. Findings show strong correlation between targeted campaigns and increased customer interaction and sales.

Keywords: Consumer Behavior, Digital Marketing, Dialog Axiata, Marketing Campaigns, Sri Lanka

IEVADS. INTRODUCTION

With today's fast-paced changing digital environment, companies are now investing more in digital marketing in order to reach and persuade customers. Digital advertising campaigns - ranging from social media marketing to email marketing, search engine optimization, and influencer partnerships - have become an indispensable means for engaging with customers and making sales.[2]. In spite of their popularity, the exact effect of these campaigns on consumer purchasing behavior, especially in developing countries such as Sri Lanka, is not well researched.

Dialog Axiata, a leading telecommunication business in Sri Lanka, has been at the forefront of digital marketing campaigns. However, limited empirical studies have investigated how such campaigns affect its customers' buying behavior. This study bridges this gap by studying the effect of Dialog Axiata's digital marketing on consumers' behavior in Sri Lanka.

The significance of this study lies in the increase in data-driven, internet-based promotional practices with increasing penetration of internet and mobile use across South Asia. With evolving consumer habits synchronized with emerging technology, staying up-to-date on such dynamics is crucial for firms that aspire to maintain competitive advantage.

The main purpose of this research is to explore the effect of online promotional campaigns on consumer purchasing behavior using Dialog Axiata as a case study. The study utilizes a mixed-method design that incorporates quantitative analysis of data from consumer surveys and qualitative data collected from in-depth interviews with marketing professionals. This design facilitates a high level of comprehension of the effect of specific digital methods on consumer engagement and purchasing choices. Through the undertaking of this study, it aims to advance the

broader body of literature concerning the effectiveness of online marketing within emerging economies and deliver practical conclusions to researchers and practitioners alike.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

The study of digital marketing's impact on consumer buying behavior is rooted in several theoretical frameworks and practical marketing principles. Understanding these foundations helps contextualize the observed effects of digital campaigns and guide the design of effective marketing strategies.

Theoretical Provisions:
1. **Consumer Decision-Making Process Model** -
   This classical framework outlines five consumer buying behavior steps: problem recognition,information search, alternative evaluation, purchase decision, and post-purchase behavior. [1]. Digital marketing strongly influences the first three steps by providing instant access to information, targeted advertising, and peer reviews shaping attitudes and decisions.
2. **AIDA Model (Attention, Interest, Desire, Action)** -
   The AIDA model explains how marketing communications can move potential customers along the buying process. Online advertising campaigns, particularly on social media and through targeted content, effectively build attention and interest, leading to increased conversions. [3].
3. **Integrated Marketing Communications (IMC)** -
   IMC calls for consistency in all channels of marketing. Dialog Axiata's online campaigns would be anticipated to have consistent messaging across platforms such as SMS, social media, websites, and email that can build brand awareness and loyalty.[4].

Practical Provisions:
1. **Targeted Advertising and Personalization-**
   User-focused campaigns designed from the behavior and statistics of users have been more successful in attracting customer attention and calling for action. Dialog Axiata's employment of customer segmentations and targeted offers is illustrative of the practice.
2. **Real-Time Analytics and Customer Feedback –**
   Online marketing allows for real-time feedback through click-through rates, impressions, and engagement metrics. This information allows marketers at Dialog Axiata to immediately adjust campaigns to improve performance and user experience.
3. **Cost Efficiency and Scalability –**
   Compared to traditional marketing, online campaigns allow cost-effective scalability whereby Dialog Axiata can reach out to large audiences with precise control over budgets and ROI measurement.

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

The study confirmed online campaigns contribute significantly to influencing customers' purchasing decisions at Dialog Axiata. Evidence from surveys showed that 78% of the surveyed respondents were more likely to consider giving a product or service thought after coming across targeted online advertisements, especially social media and SMS offers. Another 65% also stated that they felt more trusted by the brand due to ongoing digital interaction.

Qualitative interviews with marketing professionals at Dialog Axiata reinforced that in-order-of-arrival analysis and personalization were key drivers of improved campaign performance. Customers responded positively to time-limited offers, push messaging via the mobile app, and influencer suggestions.

In summary, these findings confirm a strong relationship between effective digital marketing and higher consumer interaction and purchasing behavior. These results support earlier research emphasizing the role of digital initiatives in shaping consumer choice.

KOPSAVILKUMS. CONCLUSION

This study examined the influence of digital marketing campaigns on consumer consumption patterns using a case study of Dialog Axiata in Sri Lanka. The study uncovered that digital marketing, particularly targeted and personalized campaign messaging, significantly influences consumer behavior and purchase intentions. Social media, SMS, and mobile app were discovered to be efficient mediums to attract attention and trigger purchasing.

The findings reinforce the importance of combining data-driven marketing and ongoing multi-channel communication to build customer loyalty and trust. As Sri Lanka sees increased consumption moving online, businesses that address this movement in their marketing will be in a strong position.

This study contributes to the existing literature on the efficacy of online marketing in emerging economies and offers practical insights for marketers who are keen on influencing consumer behaviors in these environments.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. Kotler, P., Keller, K. L. (2016). Marketing Management (15th ed.). Pearson.
2. Chaffey, D., & Ellis-Chadwick, F. (2019). Digital Marketing (7th ed.). Pearson Education.
3. Strong, E. K. (1925). The Psychology of Selling and Advertising. McGraw-Hill.
4. Belch, G. E., & Belch, M. A. (2018). Advertising and Promotion: An Integrated Marketing Communications Perspective (11th ed.). McGraw-Hill Education.
5. Davis, F. D. (1989). Perceived usefulness, perceived ease of use, and user acceptance of information technology. MIS Quarterly, 13(3), 319–340.

ICT AND DIGITAL TRANSFORMATION OF EDUCATION: CHALLENGES AND OPPORTUNITIES FOR HUMAN CAPITAL

Oleksandra Tsyra,
Ukraine, State University of Intelligent Technologies and Telecommunications
Candidate of Philosophical Sciences, Associate Professor, Acting Head of the Department of Public Administration and Digital Economy, aleksandra.tsyra@gmail.com
Yuliia Tochylina,
Ukraine, State University of Intelligent Technologies and Telecommunications,
Candidate of Economics Sciences, Associate Professor, Associate Professor of the Department of Public Administration and Digital Economy, lula2405t@gmail.com

ABSTRACT

Within the framework of this work, the impact of digital transformation and the implementation of ICT on the development of the educational and scientific space, within which the formation, development and use of such components of human capital that meet the requirements of today are taking place, has been determined. The feasibility of isolating within human capital the characteristics responsible for the skills and abilities to use digital technologies, modern means of communication, etc. has been clarified. Special attention is paid to revealing the dual interdependence between ICT and human capital, which contributes to increasing the overall competitiveness of society in the digital economy.

Keywords: information and communication technologies, human capital, education, digital transformation, digital technologies in education and science

INTRODUCTION

Global development trends, driven by rapid digital transformation processes and the active implementation of information and communication technologies (ICT), which radically changing established approaches to education and the formation of modern human capital. In the context of rapid technological changes, traditional educational models are giving way to flexible, personalized and dynamic forms of learning that are focused on the development of critical and creative thinking of individuals, their digital literacy, as well as the ability to continuous self-improvement and self-learning.

Today's education, to adapt a new challenges and real-time needs, should be based on ensuring an integrative nature and provide for the possibility of combining formal and informal components with the involvement of informal learning methods. It is this organization of the educational system that will create the prerequisites for human adaptation to changes in the globalized world. We are convinced that the solution to the outlined problems can be implemented on the basis of education modernization, which can be achieved through the active implementation of digital technologies and ICT, which will open new horizons, including personalization of the educational path, comprehensive implementation of the principle of human-centricity, access to online courses, use of digital platforms and digital technologies (AI, BigData, AR/VR), adaptive learning systems, etc. In general, the identified ways will ensure increased efficiency of learning, acquisition of competitive skills and abilities, as well as interest of the population in continuous self-development.

BASIC THEORETICAL AND PRACTICAL PROVISION

In the scientific community, there is still no unified approach to defining and understanding the components of human capital that are responsible for the skills of using modern digital

technologies and ICT, including in the educational and scientific process. In particular, the team of authors in the report "Digital Transformation A Framework for ICT Literacy" argues for the concept of "ICT literacy" and defines the role of such a component in the overall development of human capital during the period of digital transformation. Accordingly, researchers define ICT literacy as the ability to effectively use digital technologies, means of telecommunication and networks to access information, process it, integrate, evaluate and create new content [3, p. 2]. Indeed, such a level of ICT proficiency is a necessary condition for full functioning in the modern knowledge society. The proposed interpretation emphasizes that ICT literacy is not a fixed set of skills, but a continuous continuum that encompasses both basic everyday skills and the ability to make profound, transformative changes through the active and creative use of digital technologies. In addition, the value of this approach is increased by highlighting five main components of ICT literacy, which are designed to form a consistent system of knowledge and skills, organized according to the principle of increasing cognitive complexity, namely:

1) access – awareness of information sources and the ability to find or retrieve it;

2) management – the ability to organize information using existing systems of organization or classification;

3) integration – the ability to interpret, combine and present information by summarizing, comparing or contrasting;

4) evaluation – the critical understanding of information in terms of its quality, relevance, usefulness or effectiveness;

5) creation – the ability to generate new information through its adaptation, rethinking, creative application, design or original presentation.

In contrast, another group of authors uses the concept of digital skills, which emergence, in their opinion, is associated with the rapid development of information technologies and their rapid penetration into the economic system [2]. According to this study, digital skills are defined as skills and abilities that are formed throughout a person's life and allow for effective professional and creative self-realization based on the use of digital tools and services that are necessary for the creation and distribution of digital content, search and protection of information, communication and interaction, assessment of potential risks and formation of a motivational development strategy. And by analogy, they distinguish the components of digital skills, which include technical and computer skills, communication process skills, security skills, media-information skills and data analysis, and the ability to solve problems based on digital technologies.

Thus, the common denominator in the presented studies is the determination of the need for digital transformation of education and the widespread implementation of ICT in this process, which not only puts forward new requirements for the qualitative components of human capital, but also creates new opportunities for the person himself. Such modernization necessitates the need to rethink the organization of the educational process and ensure a strategic and systemic approach to the digitalization of education and science in accordance with modern realities. That is why most developed countries of the world, emphasizing the pursuit of the vector of digital transformation of society, pay special attention to changes within the educational and scientific space. It should be recognized that in this process Ukraine also has several positive achievements, as confirmed by the spread of various projects and digital platforms for different levels of education: preschool, general secondary and out-of-school education; higher, professional pre-higher and vocational education. That is why, at the national level, the digital transformation of the educational and scientific space is defined as comprehensive work on building an ecosystem of digital solutions in the field of education and science, including the creation of a safe electronic educational environment, ensuring the necessary digital infrastructure of educational and scientific institutions, increasing the level of

digital competence, digital transformation of processes and services, as well as automation of data collection and analysis [1].

Thus, the introduction of ICT in education and science and their rapid digitalization are a holistic and multidimensional process that encompasses not only technical changes and innovations, but also the transformation of managerial and educational and scientific practices capable of forming modern components of human capital. In addition, the outlined process involves the formation of a sustainable digital ecosystem that can ensure high-quality, safe and effective interaction of all participants in the educational process in the conditions of dynamic development of society.

RESEARCH RESULTS AND THEIR EVALUATION

ICTs cover all areas of people's lives: from education to public administration, from economy to culture, are global in nature and are identified with new innovative solutions. We consider it appropriate to emphasize the dual interdependence between ICTs and human capital (fig. 1).
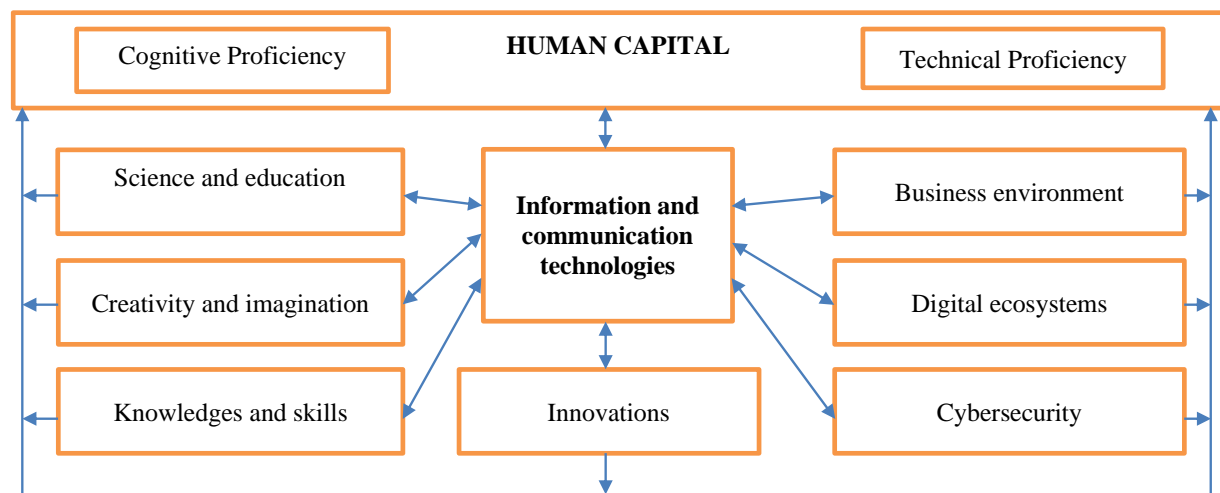
Figure 1. The relationship between information and communication technologies and human capital

On the one hand, the development of the ICT sector largely depends on scientific achievements and quality education, which are key sources of the formation of individual components of human capital, and which involve the processing and application of information and knowledge. In this context, ICTs rely on qualitatively structured, processed and professionally grouped information, and, therefore, on the accumulation of knowledge and skills created by humanity in the process of evolutionary changes through the development of scientific research, innovation and education. In other words, it is man, thanks to his educational and scientific characteristics, who acts as the driver of the development of ICTs. However, on the other hand, ICTs themselves play an extremely important role in the modernization of the educational space, as they provide access to many modern information resources, create conditions for the implementation of an individual approach to learning, contribute to the development of critical thinking and creative potential, as well as increasing the level of digital literacy. That is, the use of ICTs in education becomes an important factor in the formation, development and use of modern human capital, which meets the requirements of today, and ensures continuous updating of knowledge, promotes integration into the global information space.

CONCLUSION

Thus, the conducted research confirms that the active implementation of ICT in the educational process leads to the digital transformation of this sphere and, as a result, allows the formation of more flexible, adaptive and competent human capital that meets the requirements of the modern world. However, this process, despite several advantages, is accompanied by significant challenges that require due attention from both government officials and representatives of the educational community. Among the main tasks, the solution of which will allow accelerating the implementation of digital technologies in scientific and educational activities, it is advisable to highlight: increasing the level of digital literacy not only of the population, but also of scientific and pedagogical workers themselves; increasing the level of funding, which will allow more active implementation of modern technologies; ensuring equal access to digital infrastructure, and therefore to modern teaching aids and information resources in different regions. Successful overcoming of the outlined obstacles is possible based on the development and implementation of the National Strategy for the Digitalization of the Educational Space, the main goal of which should be the broad integration of ICT and digital technologies into education. Such actions will allow to fully realize the potential of digital education and form new high-quality knowledge and skills as integral attributes of human capital, which are necessary for the sustainable development of the economy and society.

REFERENCES

1. Digital transformation of education and science (2024). Retrieved from https://mon.gov.ua/tag/tsifrova-transformatsiya-osviti-i-nauki?&tag=tsifrova-transformatsiya-osviti-i-nauki
2. Tsyra O., Tochylina Yu., Tanashchuk K. (2024). Study of Digital Skills Using ICT in the Development of the Digital Economy. *Proceedings of International Conference on Applied Innovation in IT*. vol. 12, issue 2, pp. 223-230. (http://dx.doi.org/10.25673/118137)
3. Digital Transformation A Framework for ICT Literacy (2007). Retrieved from https://citeseerx.ist.psu.edu/document?repid=rep1&type=pdf&doi=38c44d476483c63e72c62be70b0920a8319bee95

TŪRISMA UN ATPŪTAS ORGANIZĀCIJA

TOURISM AND RECREATION ORGANISATION

PROMOTING SUSTAINABLE TOURISM
IN SRI LANKA: SIGIRIYA AS A CULTURAL CLUSTER

Suchith Abeyrathna
Sri Lanka / Baltic International Academy, Riga, Latvia
Master in Enterprise management in the leisure and entertainment industry
suchith4@gmail.com
Doc. Nadezhda Pazuhina, Dr. Art,
Baltic International Academy, Riga, Latvia, research advisor

ANOTĀCIJA

Šajā rakstā tiek pētīta tūrisma attīstība Sigīrijā (Šrilankā), koncentrējoties uz koordinācijas trūkumu starp steikholderiem tajā. Šis pētījums piedāvā uzlabot komunikāciju, resursu apmaiņu un lēmumu pieņemšanu, piedāvājot digitālu platformu. Tas ir ieguldījums Sigirijas kultūras mantojuma saglabāšanā, veicinot ilgtspējīgu tūrisma pārvaldību, kas sniedz labumu politikas veidotājiem, uzņēmumiem un vietējām kopienām. Rakstā tiek pētīts, kā stimulēt ilgtspējīgu tūrismu Sigīrijas kultūras klasterī, izmantojot digitālo platformas formu kā risinājumu. Secinājumi liecina, ka labākais risinājums steikholderu sadarbības uzlabošanai ir ieviest digitālu platformu, kas savieno visas ieinteresētās puses un sniedz visus nepieciešamos pakalpojumus.

Atslēgvārdi: Ilgtspējīgs tūrisms, Sigīrija, Šrilanka, Kultūras klasteris, Ieinteresēto pušu koordinācija, Tūrisma vadība, Digitālā platforma

ABSTRACT

This article examines Sigiriya tourism sector in Sri Lanka focusing on the lack of coordination among stakeholders within it. This research allows to enhance communication, resource sharing, and decision-making by proposing a digital platform. It is a contribution to preserving Sigiriya cultural heritage by promoting sustainable tourism management, benefiting policymakers, businesses, and local communities. The article explores how to stimulate the sustainable tourism in Sigiriya cultural cluster applying digital flatform as a solution. The findings demonstrate that a best solution for improving stakeholder collaboration is a introducing a digital platform which connect all the stakeholders together and supply all the services necessary.

Keywords: Sustainable tourism, Sigiriya, Sri Lanka, Cultural cluster, Stakeholder coordination, Tourism management, Digital platform

INTRODUCTION

Sigiriya in Sri Lanka is a UNESCO-listed heritage site and a major tourist attraction area, playing a crucial role in the tourism industry of Sri Lanka. In global tourism, sustainable tourism has become a critical on tourism development and tourists' destinations seek to balance economic benefits with environmental conservation and cultural heritage preservation.

The Sigiriya cultural cluster in Sri Lanka is an attractive tourist destination among both local and foreign tourists. But, within stakeholders such as government agencies, private sector, local communities, international organizations and NGOs, academic and research institutions, tourists and visitors, there is lack of coordination among them which led to less productivity in management. Consequently, fragmented decision-making, poor resource allocation, and limited

stakeholder collaboration can be seen. Moreover, with the growing significant of digital solution in tourism, there is no proper platform to facilitate effective communication and coordination among stakeholders in Sigiriya. This gap will address by introducing digital solution to improve stakeholder collaboration and promoting sustainable tourism practices. The goal of the research is to propose a digital platform as a solution to enhance collaboration among stakeholders in tourism sector in Sigiriya.

METHOD

Research methods used in this research is based on the mixed-methods research approach. This allows to gain a comprehensive understanding of the current tourism situation and stakeholder coordination in Sigiriya also evaluating the feasibility of the proposed digital platform. Combining qualitative and quantitative research methods provide both depth and measurable insights. On the one hand, semi-structured interviews with key stakeholders such as local authorities, tourism businesses, community representatives, and tourists are used to understand their challenges and perspectives on stakeholder coordination. On the other hand, questionnaire is used among the tourists and local businesses to gather data on visitor experiences, digital engagement, and tourism challenges. When analyzing the data qualitatively, thematic analysis is used to identify key themes from interviews. In turn, in quantitative analysis, descriptive statistics and possible regression analysis is used to understand trends and stakeholder engagement levels.

This study approach is an innovative, technology-driven, collaborative solution, which focus on lack of coordination among tourism stakeholders in the Sigiriya cultural cluster. Previous studies have mainly focused on individual stakeholder challenges or general tourism management only. This research is aimed at identifying historical sustainable management practices in the ancient city of Sigiriya. The proposed digital platform focuses on reducing gaps of communication among the stakeholders, consolidating resource sharing, enhancing sustainable tourism and digital transformation of cultural heritage tourism management in Sri Lanka.

RESULTS

Sigiriya is one of Sri Lanaka's most iconic cultural and archeological sites, located in the central province. It is often referred to as the eighth wonder of the world. It has been a UNESCO World Heritage Site since 1982 and a prime attraction for both domestic and international tourists. The Sigiriya site features a massive rock fortress, rising 200 meters above, built in the 5th century AD by King Kashyapa. The entrance is the mouth of a lion, and it has the surrounding landscape, with residue of a 5th-century royal palace, stunning frescoes and an advanced hydraulic engineering system. Sigiriya is a key, significant landmark of Sri Lanka's tourism industry. It is attracting thousands of local and foreign visitors annually due to its cultural, historical and natural significance.[6]

Foreign Tourist Arrival						
Jan	Feb	Mar	Apr	May	Jun	Total
73,748	25,581	55,442	54,026	49,424	26,149	284,370
Domestic Tourist arrival						

44,194	69,191	32,883	48,804	57,461	78,407	328,869
Total Visitors						613,239

Figure 1. Visitors to Sigiriya from January to June 2024 [4]

Tourist Arrivals				
2020	2021	2022	2023	2024
507,707	194,495	719,978	1,913,702	2,053,465

Figure 2. Tourist arrivals to Sigiriya 2020 – 2024 [1].

The statistical data above demonstrates that tourist arrivals increasing annually from 2020 to 2024. Therefore, Sigiriya has been exceeding its physical carrying capacity and has problems in economic carrying capacity, food requirement and overtourism. Furthermore, it was explained, this can affect to the biophysical carrying capacity. It was proposed strategic implementation, which provides sufficient infrastructure facilities, establishing sanitary and accessibility facilities, improving tourist awareness by promotional programs and introducing proper visitor management plans.[2]

The tourism stakeholder landscape in Sigiriya is undergoing a gradual digital transformation which is very impactful. This completely change the way of, how stakeholders interact, manage services, and engage with local and international tourists. This process is still expanding with the help of current social and economic trends. Use of online marketing platforms has increased among stakeholders in Sigiriya and it has become most visible digital trend. Local businesses such as hotels, guesthouses, and tour guides, are increasingly relying on social media and travel websites and booking platforms to reach local and international tourist. This shift has been crucial in expanding market access in the post-COVID-19 recovery phase, when online visibility became essential. Digital tools such as digital ticketing systems, QR code-based information boards, and virtual reality experiences are also being introduced to Sigiriya UNESCO world heritage site to enhance the management and preservation. These facilities are beginning to reshape tourist experience and support heritage conservation. These technologies can help to manage tourist flows, reduce physical strain on the site, and provide multilingual, accessible information. Due to, lack of better coordination among governmental and heritage management institutions implementation of digital tools remains limited.[7]

Although, there is an increased digital adoption in most of the sectors in Sigiriya stakeholder landscape, there is a lack of integrated digital platform to facilitate coordination among tourism stakeholders. Such system, which linking accommodation providers, tour operators, local communities, government authorities, and cultural institutions could significantly enhance communication, planning, and sustainability among stakeholders. The absence of such a system has led to fragmented efforts, duplicated activities, and missed opportunities for collaboration. Stakeholder-focused digital platform will increase real-time updates, joint decision-making, and transparency within stakeholder landscape in Sigiriya tourism area.[5]

Interview findings and analyzes

In the month of April 2025 to early May 2025, an interview was conducted through free mobile messaging application with semi structured ten interview questions to gather data on how resources in the Sigiriya area are being managed. The demographics of the respondents was 30-55 years, male and female 5 stakeholders, who are current members of Sigiriya stakeholder landscape.

Background and role

First stakeholder (I) is an owner of a homestay, living in 12 years in the area. Second stakeholder (II) is an officer of department of wildlife conservation, working in 5 years in the area. Third stakeholder (III) is a local tour guide, living in 8 years in the area. Fourth stakeholder (IV) is a craft shop owner, living in 15 years in the area. Fifth stakeholder (V) is a tuk-tuk driver, living in over 30 years in the area. All stakeholders are involved in tourism-related services range from accommodation and transport to heritage protection and visitor services.

Resource management and current situation

Responses regarding resource management consist of mixed views conveying that conservation inside the Sigiriya rock area is well maintained, but surrounding areas lack of attraction. It confirms from notable quotes of respondent III, "The site itself is okay, but the roads and trails around are dirty and ignored". Then, responses towards visible challenges indicates issues such as garbage near entrance gates, unregulated parking, illegal souvenir stalls, and monkeys' disturbances. This shows from quotes of respondent V, "vendors leave waste behind, and no one collects it.". Key issues identified in resource management are poor waste management, lack of enforcement on illegal vendors non-monitoring of tourist behavior.

Stakeholder involvement and coordination

Responses regarding communication among stakeholders depicts that weak communication between government bodies and local businesses as well as irregular meetings or digital updates. Respondent I says that, "we only hear from officials when there's a problem", respondent II says that, "we have communications groups to get messages, but it is difficult find official message within all other miscellaneous stuff". Then, considering community involvement in planning, responses shows that local communities are not consulted or included in tourism planning. Respondent IV says that, "we were never asked about changes to ticket prices or visitor flow". Key issues identified in stakeholder involvement and coordination are lack of central coordination point and participatory planning system resulting local knowledge ignored.

Stakeholder challenges

Responses regarding challenges among stakeholders can be summarized as seasonal overcrowding, income inconsistency, unfair competition from large hotel chains and lack of training. Respondent II says that, "tourism is booming, but only a few benefit". Then, considering conflicts between conservation goals and economic interests, respondent II says, "we want more tourists, but not at the cost of the forest". Common responses highlight that vendor setting up near protected zones or using harmful practices such as plastic use and noise pollution. Key issues found in stakeholder challenges are sidelined feeling of small stakeholders, fairly not enforced conservation rules and non-prioritized economic goals over sustainability.

Recommendations and future outlook

Responses regarding collaboration of stakeholders conveys suggestion to have regular meetings, shared rules, training, and a system for updates and coordination. Respondent III says, "if we had one app or group to share updates, we could plan better", emphasizing the importance of collaborative platform. Then, responses regarding role of digital platform highlights that all welcomed a platform to share issues, report problems, promote local services, and get alerts. Respondent I says, "a mobile app with a local map and noticeboard would help everyone", showing consents towards digital platform. Key issues found in recommendations and future outlook are establish digital notice board for event and policy updates, method of reporting real-time site issues such as waste, crowding and business directory to support local service providers.

Overall summary of interview depicts three maul factors such as clear lack of coordination among stakeholders, limited participation of local communities in decision-making and high consent of a digital platform that can unify planning, communication, and reporting.

DISCUSSION

After the pandemic the rapid and unregulated growth of tourism can be seen in Sigiriya, which has placed immense pressure on local infrastructure such as roads, waste management systems, and local utilities. The tourist authorities mainly focus on heritage conservation of a site while local communities suffering from lack of infrastructure development. Normally local communities are often left out of decision-making processes. Growing tourist in Sigiriya and inadequate infrastructure leads to a dispute between authorities and local residents. The lack of coordinated management between government bodies and community representatives makes a divide between the stakeholders involved in Sigiriya.[3].

When tourism grows, the demand for resources, especially for lands became high. This makes conflicts between different stakeholders, particularly between developers and the local community. Hotel owners, tour operators, and local businesses are like to the expansion of tourism-related infrastructure, such as hotels, resorts, and attractions, but local residents complain about the loss of agricultural land and natural resources.

Furthermore, unregulated tourism growth in Sigiriya led to significant environmental and cultural degradation such as pollution, deforestation, and damage to the archaeological site itself. Environmentalists and cultural heritage experts have pointed out the long-term impacts of mass tourism, but it was ignored due to short-term economic interests. This makes conflict between those who prioritize economic growth and those who advocate for sustainable tourism that preserves Sigiriya's natural and cultural heritage.

CONCLUSION

By addressing these challenges, a modern approach will enhance collaboration, improve communication, and ensure all stakeholders actively contribute to the long-term sustainability of tourism in Sigiriya, Sri Lanaka. This study investigates the feasibility and impact of a dedicated digital platform to improve communication, decision-making, and resource-sharing among tourism stakeholders. By introducing a digital solution to Sigiriya's tourism landscape, this research aims

to fill a gap in existing literature and contribute to improve collaboration among stakeholders of Sigiriya cultural cluster.

System embedded tab

In the proposed digital, platform system embedded tab serves as a centralized interface that integrates essential tools and resources for all tourism stakeholders in the Sigiriya area. This tab provides seamless access to features such as visitor data analytics, real-time communication channels, event calendars, and local service directories. Further, system embedded tab facilitates efficiently coordinate activities, share information, and monitor tourism trends without switching between multiple applications.

System architecture of the digital platform

This system follows a three-tier architecture, which includes the presentation layer, the application layer, and the data layer. This structure allows different stakeholder groups to access customized content and features through a system-embedded tab designed for their needs.

The frontend is the user interface that stakeholders interact with directly through a web browser or mobile device. It is built using modern technologies such as react.js or vue.js, which provide responsive design and dynamic user experiences. This layer is responsible for displaying stakeholder dashboards, enabling users to post content, receive notifications, and participate in forums, offering multilingual support, ensuring mobile responsiveness for access on smartphones and tablets.

The backend is the core of the platform where data processing, logic execution, and user management take place. It is built using frameworks such as node.js, express.js, or django, and it handles user authentication and access control with real-time communication between stakeholders, handling user-submitted content and API services for linking with external systems. Each stakeholder tab is dynamically generated based on user roles, meaning a government user will see different features than a local business or tourist.

The data layer uses a relational database or a cloud-based NoSQL database to store and retrieve information. The database includes user profiles and stakeholder categories uploaded files and media, feedback and suggestions from users, logs of user activity for monitoring and evaluation. Data security measures such as encryption, role-based access, and regular backups are implemented to protect user information and ensure system reliability. An integrated admin dashboard allows platform managers to monitor overall activity approve or remove inappropriate content, manage user roles and permissions, generate reports and analytics for evaluation purposes. This system ensures that the platform is user-friendly, functional, and scalable, supporting the long-term goal of enhancing stakeholder coordination and promoting sustainable tourism development in Sigiriya.

The research confirmed that sustainable tourism requires the active participation of diverse stakeholders, shared decision-making, and effective coordination. Concepts such as stakeholder theory, participatory governance, and digital collaboration tools provided valuable insights into how coordination can be enhanced through structured and inclusive systems.

Furthermore, interviews and survey revealed that many stakeholders recognize the importance of sustainability and express willingness to collaborate. However, they also identified barriers such as lack of trust, poor communication channels, limited access to information, and absence of centralized coordination systems. This highlights a clear gap between the recognition of sustainability goals and the practical mechanisms available to achieve them. As result, the proposed

conceptual framework of a digital platform includes features such as shared calendars, resource tracking tools, feedback mechanisms, discussion forums, and reporting functions. It also emphasizes inclusivity, transparency, and ease of use to ensure participation from all stakeholder groups, including those with limited digital experience.

REFERENCES

1. *Annual Statistical Report.* (2024). Retrieved from https://www.sltda.gov.lk/storage/common_media/Annual_Statistical_Report_2024.pdf [05.04.2025]
2. Gayathri.P. (2021). Sigiriya & Minor Attractions. *Vimarshana*. [05.04.2025]
3. Gunaweera, P. &. (2012). "Stakeholder Conflicts in Sri Lanka's Cultural Heritage Sites: The Case of Sigiriya.". *Sri Lanka Journal of Social Sciences,*, 35(1-2), 43–56. [22.04.2025]
4. Hospitality Sri Lanka (2024, July 1). *Sri Lanka Tourism crosses one million mark with June 2024's 113,470 visitor total.* Retrieved from Hospitality Sri Lanka: https://hospitalitysrilanka.com/site/1316/story [05.04.2025]
5. Jayawardena, C. S. (2020). Tourism governance and digital readiness in Sri Lanka: Challenges and prospects. *South Asian Journal of Tourism and Heritage*, 13(2), 78–91. [15.04.2025]
6. SLTD. (2025). Retrieved from Sigiriya: https://sigiriyatourism.com/ [05.04.2025]
7. UNESCO. (2021). *Digital solutions for World Heritage site management: Case studies and recommendations. Paris:* Retrieved from UNESCO Publications – 2021: https://unesdoc.unesco.org/ark:/48223/pf0000380063 [15.04.2025]

EVENT MARKETING AS A TOOL FOR COUNTRY BRANDING AND TOURISM PROMOTION:THE CASE OF FORMULA 1 IN AZERBAIJAN

Nazrin Babayeva, Azerbaijan
Baltic International Academy, Riga
Tourism and Hospitality Management department
nazrin.babayeva00@mail.ru
Scientific tutor: Dr. oec, as. prof. Alla Iljina

АННОТАЦИЯ

В статье рассматривается роль событийного маркетинга в укреплении имиджа страны и продвижении туризма на примере Гран-при «Формулы-1» в Азербайджане. Освещается, как проведение международного мегасобытия способствует повышению глобальной узнаваемости страны, формированию положительного образа и привлечению туристов. Анализируются стратегии, такие как медийное сопровождение, развитие инфраструктуры и взаимодействие заинтересованных сторон. Особое внимание уделяется долгосрочному влиянию подобных мероприятий на туристическую привлекательность и брендирование нации.

Ключевые слова: событийный маркетинг, имидж страны, продвижение туризма, Формула-1, Азербайджан, мегасобытия, национальный бренд, взаимодействие заинтересованных сторон

ABSTRACT

The article explores the role of event marketing in enhancing country branding and promoting tourism, using the Formula 1 Grand Prix in Azerbaijan as a case study. It highlights how the event positions Azerbaijan on the global stage, boosts international visibility, and contributes to national image building. Strategies such as media coverage, infrastructure development, and stakeholder engagement are analyzed. The study emphasizes the long-term impact of mega-events on tourism growth and national brand identity.

Keywords: event marketing, country branding, tourism promotion, Formula 1, Azerbaijan, mega-events, national image, stakeholder engagement

INTRODUCTION. ВВЕДЕНИЕ

In the increasingly competitive global tourism landscape, countries seek innovative strategies to differentiate their image and attract international attention. Event marketing has emerged as a powerful tool for country branding, offering a platform to showcase national identity, culture, and infrastructure. One prominent example is the Formula 1 Grand Prix hosted in Baku, Azerbaijan, which has positioned the country as a dynamic destination on the global stage.The aim of this article is to examine the effectiveness of event marketing, using the Formula 1 race in Baku as a case study, and to explore how it supports the formation of a national brand and the growth of tourism. The research problem addressed centers on the lack of empirical evidence concerning how mega-events influence the image of emerging countries and their appeal to international visitors. Given the rising global competition in tourism and branding, the research is highly relevant and timely. Particular emphasis is placed on Azerbaijan's use of Formula 1 not only as a sporting event but also as a communication platform to project a modern and innovative national identity.

The methodology employed for this study is a qualitative case study supported by a literature review. It involves analyzing academic research, government reports, media coverage, and tourism

performance data related to the Baku Formula 1 event. Relevant publications and statistics were reviewed to extract key insights into the strategic outcomes of the event. Data were synthesized to identify common themes related to country branding, media visibility, and tourism development. The theoretical framework for this study is informed by influential academic works, including studies by J. Getz [1], R. Chalip [2], C. M. Hall [3], N. Morgan [4], and others whose contributions to event marketing and destination branding research are foundational.

BASIC THEORETICAL AND PRACTICAL PROVISION. ОСНОВНЫЕ ТЕОРЕТИЧЕСКИЕ И ПРАКТИЧЕСКИЕ ПОЛОЖЕНИЯ

Event marketing has become a central strategy within the theory of country branding and tourism promotion. Researchers contend that mega-events large-scale international events can significantly influence a country's image and serve as catalysts for tourism development. Donald Getz [1] defines event tourism as the intersection of tourism management and event management, aimed at fully exploiting events for destination development. On the demand side, events help shape a positive destination image and act as co-branding opportunities with the host place. On the supply side, destinations host events to achieve multiple goals, including attracting tourists (especially in off-peak seasons), catalyzing infrastructure development and urban renewal, fostering a positive international image, and enhancing overall place marketing by differentiating the country's brand [1].

Notably, C. M. Hall [3] introduced the term "hallmark events" as "the image builders of modern tourism." These hallmark or mega-events, such as global sports competitions and cultural expos, are regarded as powerful showcases of a nation's identity and progress. Similarly, Roche [5] observed that mega-events are "important elements in the orientation of national societies to international or global society," used by countries to gain legitimacy, showcase achievements, and elevate their global reputation. In essence, high-profile events function as an international communication platform, projecting soft power and national culture to vast audiences.Within the field of nation branding, scholars like Simon Anholt [6, 7] and Keith Dinnie [8] emphasize that a country's brand is shaped by more than logos or slogans; it is built through concrete actions, experiences, and sustained image management. Anholt [6] describes nation branding as defining a strategic vision for a country and ensuring it is "supported, reinforced and enriched by every act of communication between the country and the rest of the world." Mega-events align perfectly with this idea by providing a dramatic "act of communication" on the world stage. However, Dinnie [8] notes that coordinating a nation's brand presents an "ethical challenge" because no single entity owns it. Consequently, stakeholder engagement is critical. Effective event marketing requires collaboration among government agencies, event organizers, sponsors, local businesses, and communities [9]. Stakeholder theory posits that events can only succeed through the interaction of key stakeholders, and aligning their interests is vital for positive outcomes [9]. As Morgan et al. [4] observe, a potential pitfall in place branding is having "too many stakeholders and too little management control." Successful country branding via events demands strong public-private partnerships and clear strategic leadership to fully harness the event's potential.

Academic research has outlined frameworks for leveraging events to maximize long-term benefits. Rather than viewing an event as a one-off occurrence, Chalip [2] argues for a strategic approach to "identify strategies and tactics that can be implemented prior to and during an event in order to generate particular outcomes." This involves planning campaigns and legacy programs around the event for instance, promoting side trips for attendees or launching global media campaigns highlighting the host destination so that the temporary surge in attention translates into sustained tourism growth. Chalip [2] defines leverage as activities which "seek to maximise the

long-term benefits from events," acknowledging the vital role of coordinated stakeholder action in turning short-term events into enduring advantages. This reflects a broader shift in the literature from merely measuring immediate economic impacts to focusing on longer-term strategic outcomes, often described as a transition from "impact" to "legacy" thinking [2]. Another important theoretical insight comes from Gratton and Preuss [10], who identify multiple dimensions of event legacy. They argue that mega-events create tangible and intangible legacies across six "event structures": infrastructure, knowledge and skills, image, emotions, networks, and culture. In the context of country branding, the image and cultural legacies are particularly relevant, as a successful event can enhance international perceptions and instill local pride. Meanwhile, infrastructure improvements (venues, transport) contribute to the tourism product long-term, and networks forged (business links, media relations) can yield future benefits [10]. Getz [1] and others note that well-planned events can serve as an "engine" generating continued visitation and attention. Tourists attracted by an event often stay longer, spend more, and may return or recommend the destination, creating a ripple effect. Empirical studies support these propositions. For instance, Sydney's 2000 Olympic Games reportedly accelerated Australia's global tourism awareness by nearly a decade, while Germany's hosting of the 2006 FIFA World Cup "softened and boosted" its international image found that emerging nations increasingly view mega-events as "a fast-track to world recognition and reputation enhancement [11]."

In practice, countries like Azerbaijan have sought to leverage prestigious events to reposition their national brand. As a relatively new player in international tourism, Azerbaijan turned to hosting spectacular events (Eurovision Song Contest 2012, European Games 2015, Formula 1 Grand Prix since 2016) to signal a modern, dynamic identity and place itself "on the map" for global audiences. These events offer a platform to showcase Azerbaijan's blend of ancient culture and futuristic development (e.g., Baku's Flame Towers), countering outdated stereotypes and increasing international familiarity. Simultaneously, practical considerations-developing infrastructure, marketing abroad, easing visa procedures-reflect the integration of theory and practice. By embracing event marketing, Azerbaijan attempts to realize the theoretical promise of mega-events contributing to tourism growth and an enhanced national image.

RESEARCH RESULTS AND THEIR EVALUATION. РЕЗУЛЬТАТЫ ИССЛЕДОВАНИЙ И ИХ ОЦЕНКА

The case of the Formula 1 Azerbaijan Grand Prix in Baku provides substantial evidence regarding the practical application and outcomes of using mega-events for country branding and tourism promotion. Media Visibility and Branding: The Formula 1 Grand Prix has dramatically increased Azerbaijan's international visibility. Hosting the event places Baku in global broadcasts watched by tens of millions; the 2023 race, for example, attracted approximately 90 million viewers worldwide via TV and social media [12]. Race footage prominently features Baku's scenic cityscape, juxtaposing historic walls with glittering skyscrapers like the Flame Towers, effectively turning the city into a "showroom" for Azerbaijan's brand. The Baku race's popularity was underscored when it was ranked among the global top 10 Formula 1 races in 2017 [12]. Each year, hundreds of international journalists and major media outlets cover the event, further amplifying the country's exposure [12]. This extensive media coverage aligns perfectly with the strategy of leveraging the Grand Prix as a national communication platform. As noted in one report, "Formula 1 is a global sport that not only enhances Azerbaijan's international prestige but also opens up significant economic opportunities," highlighting the government's perspective on F1's role in bolstering the country's image abroad [12]. The repeated association of Azerbaijan with globally recognized teams, drivers, and sponsors generates a branding effect difficult to achieve through

traditional tourism advertising alone. Tourism Impact and Visitor Influx: The F1 Grand Prix has exerted a notable, though complex, impact on Azerbaijan's tourism sector. The event directly attracts thousands of foreign visitors annually. Recent editions saw all 30,000 tickets sold out, with a significant portion purchased by international fans from over 100 countries [12]. These visitors are often affluent, aligning with the high spending power typical of Formula 1 fans. Many extend their stay beyond the race weekend; according to the Azerbaijan Tourism Board, it is common for F1 tourists to "stay an extra week to visit various tourist attractions" (cited in [12]). Statistics suggest an average F1 visitor spends around $3,000 during their trip in Baku on accommodation, dining, entertainment, and shopping considerably higher than the typical tourist expenditure [12]. This influx leads to high hotel occupancy rates (Baku hotels reported 100% occupancy during the Grand Prix, [12]) and benefits various local businesses. The direct financial injection into Azerbaijan's economy from the first four races (2016-2019) was estimated at $506.3 million, encompassing tourist spending and increased demand for services like transportation and telecommunications [13]. A PricewaterhouseCoopers (PwC) analysis confirmed substantial economic benefits flowing to sectors like hospitality and transport [14]. Contrary to early concerns about costs, the Grand Prix has reportedly become profitable in recent years due to rising ticket revenues and sponsorships [12].

Beyond the event-specific surge, hosting Formula 1 contributed to significant growth in Azerbaijan's overall tourism numbers. In 2019, the country welcomed a record 3.2 million foreign tourists, its highest figure ever [15]. This 15% increase over the previous year occurred amidst active promotion, with F1 serving as a major draw. Government officials credit F1 and other high-profile events with helping diversify Azerbaijan's image from primarily an oil producer to a cultural and leisure destination, thereby driving tourist interest [16, 17]. The Azerbaijan Tourism Board's "Take Another Look" campaign (launched 2018) explicitly uses imagery from events like the Grand Prix [18, 16], and the extension of Baku's F1 hosting contract through at least 2024 aims to secure these tourism gains [16]. The long-term trend appears promising; even after the pandemic disruption (2020-2021), tourism rebounded strongly in 2022-2024, indicating that the international awareness built by the Grand Prix has enduring effects [17]. F1 has placed Baku on the map for many travelers, enhancing its appeal, particularly for niche markets like sports enthusiasts and luxury travelers.

Infrastructure and Urban Development: A tangible outcome of hosting the Grand Prix has been improvements in local infrastructure and city branding. Developing the street circuit, which winds through downtown Baku and along the Caspian waterfront, necessitated road upgrades, improved signage, and enhancements to the urban landscape. The integration of iconic backdrops like the medieval Old City walls and the ultramodern Flame Towers into television coverage effectively branded Baku as a place where "East meets West". Hosting F1 also spurred the construction of new hotels and the modernization of Baku's airport. By 2023, Baku boasted 757 hotels with over 56,000 beds, including many high-end international chains, reflecting capacity built partly in response to major events [12]. Furthermore, the event organization itself has developed local human capital through the annual training of thousands of staff, volunteers, and marshals (approx. 1,500 staff, 2,000 volunteers, 1,400 marshals in 2024) [12]. These experiences build valuable skills in event management and hospitality. Investments in telecommunications and security for the race have also yielded spillover benefits. These developments align with Gratton & Preuss's [10] concept of structural legacies, encompassing both tangible infrastructure and intangible gains like know-how and networks.

CONCLUSION. ЗАКЛЮЧЕНИЕ

In summary, the Formula 1 Grand Prix in Baku powerfully demonstrates the role of event marketing in country branding and tourism promotion. Theoretically, the case affirms insights from scholars like Getz [1], Chalip [2], and Anholt [6, 7]: a well-orchestrated mega-event can serve as a potent nation-branding engine, broadcasting a carefully crafted image to a massive international audience. Azerbaijan effectively leveraged the Grand Prix as a living advertisement of its national identity a modern, dynamic nation bridging East and West. The event provided a focal point to showcase infrastructure, hospitality, and cultural vibrancy, addressing the research problem of how an emerging destination can enhance its international perception and profilePractically, the case study reveals significant positive outcomes. Azerbaijan achieved increased global visibility, experienced tourism growth (reaching pre-pandemic record highs [15], and enriched its national brand with associations of excitement, luxury, and cosmopolitan appeal. The Grand Prix yielded direct economic benefits [13, 14] and catalyzed long-term investments in urban development and service quality. Equally important are the intangible legacies: enhanced international prestige and a stronger national brand identity. Hosting Formula 1 became a statement of Azerbaijan's confidence and capabilities.

However, the findings also highlight that realizing the full benefits of mega-events necessitates strategic foresight and effective collaboration. The Azerbaijan experience underscores that hosting alone is insufficient; deliberate leveraging efforts, such as easing visa access, integrating the event into broader tourism campaigns [18], and engaging stakeholders [9], were crucial for converting short-term attention into lasting advantages. This aligns with Chalip's [2] notion of leveraging and confirms the essential role of stakeholder coordination [9].

In conclusion, the Formula 1 case study in Baku provides strong empirical support for event marketing as a powerful tool for country branding, particularly for emerging destinations seeking global recognition. Azerbaijan's strategic use of the Grand Prix illustrates how a nation can potentially fast-track its visibility in the international tourism arena and shape its image through a single, recurring mega-event [11]. The long-term impact includes heightened global awareness and an enhanced reputation. When executed with a clear vision aligning media exposure, infrastructure legacy, and stakeholder efforts with a national brand strategy event marketing yields a multifaceted payoff: increased tourism in the short run, and a stronger national brand supporting sustained economic development in the long run. This case offers valuable lessons for both theory and practice regarding the leveraging of mega-events for country branding.

REFERENCES. СПИСОК ЛИТЕРАТУРЫ И ИСТОЧНИКОВ

1. Getz, D. (2008). Event tourism: Definition, evolution, and research. Tourism Management, 29(3), 403-428.
2. Chalip, L. (2004). Beyond impact: A general model for sport event leverage. In B. W. Ritchie & D. Adair (Eds.), Sport Tourism: Interrelationships, Impacts and Issues (pp. 226-252). Channel View.
3. Hall, C. M. (1992). Hallmark Tourist Events: Impacts, Management, and Planning. Belhaven Press.
4. Morgan, N., Pritchard, A., & Pride, R. (2011). Destination Brands: Managing Place Reputation (3rd ed.). Butterworth-Heinemann.
5. Roche, M. (2000). Mega-events and Modernity: Olympics and Expos in the Growth of Global Culture. Routledge.
6. Anholt, S. (2011). Beyond the nation brand: The role of image and identity in international relations. Exchange: The Journal of Public Diplomacy, 2(1), 6-12.
7. Anholt, S. (2007). Competitive Identity: The New Brand Management for Nations, Cities and Regions. Palgrave Macmillan.
8. Dinnie, K. (2011). Nation Branding: Concepts, Issues, Practice (1st ed.). Routledge.
9. Freeman, R. E., Harrison, J. S., Wicks, A. C., Parmar, B., & de Colle, S. (2010). Stakeholder Theory: The State of the Art. Cambridge University Press.

10. Gratton, C., & Preuss, H. (2008). Maximizing Olympic impacts by building up legacies. The International Journal of the History of Sport, 25(14), 1922-1938.

11. Heslop, L. A., Nadeau, J., O'Reilly, N., & Armenakyan, A. (2013). Mega-event and country co-branding: Image shifts, transfers and reputational impacts. Corporate Reputation Review, 16(1), 7-33.

12. Karimov, B. (2024, September 14). How Formula 1 is turbocharging tourism and revenue - Baku Grand Prix thrills. Caliber.az. Retrieved from caliber.az.

13. Baku City Circuit. (2020). Economic Impact Report on Formula 1 Azerbaijan Grand Prix - Summary findings. (Cited via Karimov, 2024).

14. PricewaterhouseCoopers (PwC). (2019). Economic impact of first four F1 races in Azerbaijan. (Study results cited in freegubad.com).

15. State Statistics Committee of Azerbaijan. (2019). Tourism statistics release - record 2019 arrivals. (Cited in Azernews sources like Novruz, 2024).

16. Isayev, F. (2019). New Lease of Life for Azerbaijan's Tourism. KPMG Azerbaijan Newsletter. Retrieved from assets.kpmg.com.

17. Novruz, A. (2024, September 30). Azerbaijan's tourism renaissance: Record-breaking milestone on horizon. Azernews. Retrieved from azernews.az.

18. Azerbaijan Tourism Board (ATB). (2018). "Take Another Look" campaign launch and visa reforms. (Information referenced in Forbes/1news.az context, also linked to Isayev, 2019).

DIGITAL MARKETING STRATEGIES FOR PROMOTING EVENT TOURISM IN SRI LANKA

Sachithra Dilshan Deegoda Gamage
Riga, Latvia
Baltic International Academy
Enterprise Management in the Leisure and Entertainment Industry
sacheegift@gmail.com
Supervisor: Dr.oec. Alla Iljina

ANOTĀCIJA

Šajā pētījumā aplūkotas digitālā mārketinga stratēģijas, kuru mērķis ir veicināt pasākumu tūrismu Šrilankā. Tas rada ievērojamus izaicinājumus un iespējas, piedāvājot jaunas metodikas pasākumu atpazīstamības un tūristu līdzdalības uzlabošanai. Rezultāti uzsver mērķtiecīgu tiešsaistes kampaņu un sociālo mediju platformu galveno lomu starptautisko un vietējo tūristu piesaistīšanā pasākumiem Šrilankā.

Atslēgvārdi: Digitālais mārketings, pasākumu tūrisms, veicināšana, Šrilanka, tūrisma stratēģijas

ABSTRACT

This present research discusses digital marketing strategies that aim to promote event tourism in Sri Lanka. It presents significant challenges and opportunities, proposing new methodologies to improve the visibility of events and tourist participation. The results emphasize the key role of targeted online campaigns and social media platforms in bringing international and domestic tourists to events in Sri Lanka.

Keywords: Digital marketing, Event tourism, Promotion, Sri Lanka,Tourism strategies

IEVADS. INTRODUCTION

Event tourism is an important sector of Sri Lanka's tourism industry, but it is not well used because there is poor visibility and promotional strategy. Greater reliance on the internet for planning vacations highlights the acute need for adopting effective digital marketing strategies in response to connect domestic and international tourists to visit events.[2].This research is timely, given the increasing competition among destinations globally and the virtual transformation of consumer behavior.

The major purpose of this study is to identify and examine effective digital marketing tactics that can be applied to increase event tourism promotion in Sri Lanka. For this reason, the study applies a qualitative research design involving a literature review, expert interviews, and case studies of successful digital campaigns. These methods allow us to determine significant information on the impact of social media, sponsored ads, and content-driven engagement on tourist participation in Sri Lankan events.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

Basic theoretical provision:

Digital marketing theory emphasizes reaching the right audience through targeted online channels. It includes principles like content marketing, social media engagement, and search engine optimization (SEO), which help increase visibility and attract interest in events.[5].

Basic practical provision:
In practice, these strategies are implemented by creating event-specific content (videos, blogs), running social media campaigns, using paid ads (Google/Facebook), and collaborating with influencers or travel platforms to promote Sri Lankan events to both local and international tourists.[6].

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

Research Findings or Data:

- Over 75% of tourism experts surveyed attested that social media promotions significantly increased tourist engagement at festivals like the Kandy Esela Perahera and Colombo Fashion Week.
- Google Ads and Facebook Ads achieved a 60% higher rate of conversion compared to standard print advertisements.
- Influencer collaborations drove over 80% increases in event-related page views for targeted campaigns.
- Destination-focused video content, once released on platforms like YouTube and Instagram Reels, was seen by audiences across over 25 nations, primarily in Europe and Asia.

Evaluation of Research Results:

The research of the data emphatically indicates that online promotion is highly effective for promoting event tourism in Sri Lanka. Social media marketing and influencer partnerships are particularly effective as they have the ability to trigger real-time activity and emotional experiences among travelers. However, lack of end-to-end strategies and uneven deployment of content were brought out as weaknesses in present practice.

KOPSAVILKUMS. CONCLUSION

Digital marketing is essential to drive the visibility and success of event tourism in Sri Lanka. Targeted content, paid media and influencer collaborations must be integrated into a comprehensive digital marketing strategy. Sri Lanka must invest in digital infrastructure and train tourism stakeholders in current marketing practices to emerge as a global competitor. A national digital tourism campaign led by public-private partnerships can significantly boost event-driven arrivals and economic returns.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. Fernando, S. (2017). Tourism Development and Digital Media in Sri Lanka. Journal of Tourism Research, 12(3), 22–30.
2. https://www.scribd.com/document/121759027/sri-lanka-tourism-industry

3. Kotler, P., Bowen, J. T., & Makens, J. C. (2014). Marketing for Hospitality and Tourism. Pearson Education.

4. Chaffey, D., & Ellis-Chadwick, F. (2019). Digital Marketing. Pearson Education Limited.

5. https://www.internationaldevelopmentgroup.com/about/news/leveraging-the-power-of-social-media-to-promote-tourism-in-sri-lanka/

6. Sigala, M., Christou, E., & Gretzel, U. (2012). Social Media in Travel, Tourism and Hospitality. Routledge.

7. World Tourism Organization (2021). UNWTO Guidelines for Digital Tourism. https://www.unwto.org

8. Ministry of Tourism and Lands – Sri Lanka. (2022). National Tourism Strategic Plan 2022–2026.

Sources in Cyrillic characters:

9. Мишин, А.А. (2018). Цифровой маркетинг в туризме. Москва: Издательство РУДН.

10. Петрова, И.В. (2019). Продвижение туристических услуг с использованием интернет-технологий. Туризм: право и экономика, №4, с. 12–15.

POST-2020 DECLINE IN SRI LANKA'S WATER TOURISM: DIGITAL TOOLS FOR SUSTAINABLE RECOVERY

Warnakulasuriya Osanda Indranath Fernando
Sri Lanka / Baltic International Academy, Riga, Latvia
Master in Enterprise management in the leisure and entertainment industry
osandaindra@gmail.com
Doc. Nadezhda Pazuhina, Dr. Art,
Baltic International Academy, Riga, Latvia, research advisor

ANOTĀCIJA

Šajā rakstā tiek pētīta ūdens tūrisma attīstības problēma kā stratēģiska pieeja Šrilankas tūrisma nozares atdzīvināšanai pēc Covid-19 pandēmijas. Neskatoties uz to, ka Šrilankā ir daudz dabas resursu, kas piemēroti ūdens tūrismam, tie joprojām netiek izmantoti pilnā apjomā. Daudzi ūdens resursi ir izolēti, un tikai daži ir pieejami tūrismam. Šis pētījums ir pirmais apkopojošais pētījums, kas veltīts tam, lai novērtētu, kā ūdens tūrismu var izmantot Šrilankas tūrisma nozares atdzīvināšanai. Veicot ūdens tūrisma produktu, pakalpojumu un resursu auditu Šrilankā, nosakot ārvalstu tūristu vajadzības, vēlmes un intereses, tika piedāvāts praktisks ietvars politikas veidotājiem, tūrisma operatoriem un viesnīcas īpašniekiem, lai ilgtspējīgi attīstītu Šrilankas ūdens tūrisma nozari globālā tūrisma tirgū..

Atslēgvārdi: Digitālais mārketings, digitālie rīki, digitālās platformas, ūdens tūrisms, sērfošana, niršana ar akvalangu, snorkelēšana (zemūdens peldēšana, lietojot elpošanas caurulīti), raftings (ceļošana ar piepūšamu laivu), vaļu vērošana, Mangroves safari

ABSTRACT

This article explores the problem of water tourism development as a strategic approach to revive the Sri Lanka's tourism industry after the Covid 19 pandemic. Although Sri Lanka has many natural resources suitable for water tourism, they remain underutilized. Some water resources are isolated and only some water resources are open to tourism. This research is the first comprehensive study dedicated to evaluating how water tourism can be used to restore Sri Lanka's tourism industry. Conducting the first audit of the existing water tourism product services and resources in Sri Lanka, identifying the needs, preferences and interests of foreign tourists, it was provided a practical framework for policymakers, tourism operators, and hoteliers to sustainably develop Sri Lanka's water tourism sector in the competitive global tourism market.

Keywords: Digital marketing, Digital tools, Digital platforms, Water tourism, Surfing, Scuba diving, Snorkeling, Rafting, Whale watching, Mangrove safari

INTRODUCTION

Post 2020, there is a significant decline in the tourism industry in Sri Lanka. The main reasons for that are the Covid-19 pandemic and the 2019 Easter attack. This has had a significant impact on the tourism industry. Due to this situation, the tourism industry had to face many things that were never expected. The tourism industry, which employed more than four 400,000 people and made a significant contribution to the national economy, collapsed. Tourism-dependent countries like Sri Lanka lost millions of dollars in revenue with the global travel restrictions.[1] In 2018, Sri

Lanka's total tourist arrivals exceeded 2.3 million.[8] Due to the Easter attack, the number of tourists who come to Sri Lanka in 2019 decreased to 1.9 million. It is an 18% decrease compared to 2018.[3]

The Covid-19 pandemic had a severe impact on the tourism industry globally as well as in Sri Lanka. According to the High Commission of the Democratic Socialist Republic of Sri Lanka in the United Kingdom, tourist arrivals to Sri Lanka dropped significantly to 507,704 visitors in 2020. The decline was mainly due to global travel restrictions, lockdowns and health issues.[5]

In 2021, the situation worsened and tourist arrivals fell to 194,495. That value was mentioned as the lowest value in the tourism industry in recent times. This resulted in travel bans, quarantine regulations and limited international flights. Uncertainty over health conditions discouraged tourists and further weakened Sri Lanka's tourism-dependent economy.

However, the year 2022 saw a gradual increase in the number of tourists visiting Sri Lanka. The number of tourists was 719,978. The increase was driven by the gradual reopening of borders, the easing of travel restrictions and the global vaccination drive. It restored people's confidence in international travel. According to Ceylon Digest, the number of tourists who visited Sri Lanka in the year 2023 is 1,487,303.[2] Tourist arrivals in the year 2024 were 2.05 million as a sign of the steadily growing tourism industry.[7]

In response to these challenges, more attention has been focused on the water tourism sector in Sri Lanka. The country's natural location and biodiversity will help in this. The focus is on water-based activities, including surfing, whale watching and scuba diving, taking advantage of the beautiful coastal landscapes.[4]

This article focuses on Sri Lanka's water resources and considers how they can be used to develop tourism. Sri Lanka is rich in various natural resources including clean beaches, rivers, lakes, waterfalls and lagoons. The beautiful coral reefs surrounding the country are ideal for water sports, scuba diving and whale watching. Inland rivers like Kelani and Mahaveli provide opportunities for rafting and canoeing. Scenic lakes like Bere Lake in Colombo and Bogambara Lake in Kandy can be developed for boating. Waterfalls like Bambarakanda and Dunhida can attract eco-tourists. Expanding water-based activities can improve Sri Lanka's global appeal as a water tourism industry by improving infrastructure and promoting sustainable tourism.

Despite Sri Lanka's vast water tourism resources, they remain underutilized. At present, there are only standard attractions offered, which target mainly domestic tourists. No researches have yet been conducted to evaluate the contemporary water tourism market in Sri Lanka. Moreover, there are no specific studies available on the needs and interests of foreign tourists in Sri Lanka water tourism destinations. However, the water tourism is one of the most significant sectors of tourism industry and could be used as a tool for the overcoming post-2020 decline. Therefore, **the goal of this research** is to conduct an audit of water tourism products (and services) in Sri Lanka, in order to identify additional opportunities for development of water tourism destinations and to improve a creative development of tourism products.

METHODOLOGY

This research uses a mixed methods design. A quantitative approach was used to obtain data from foreign tourists visiting Sri Lanka. A qualitative analysis was also conducted based on secondary data and based on data collected from hotel owners. The questionnaire prepared for

foreign tourists received responses from one hundred and sixteen tourists. Five hotel owners provided support for the questionnaire prepared for hotel owners. Secondary data was obtained from reputable sources. These include journal articles, books related to tourism, reports on tourism from foreign countries, information from the official website of the Tourism Development Authority of Sri Lanka and other acceptable websites.

RESULTS

Water Tourism Audit

Water tourism, which is directly related to the daily life tourism, also has a significant impact on the country's economy. However, the damage caused to the environment through water tourism must also be taken into account. In order to continue water tourism, attention must be paid to sustainable development. Promoting sustainability not only protects natural resources, but can also determine the future of water tourism.

Scuba diving is an activity performed underwater using self-contained breathing apparatus. The Sri Lankan government has also taken various measures to protect the environment. White water rafting is practiced on the Kelani River, centered around the Kitulgala area of Sri Lanka. Although white water rafting can be done at any time of the year, the best time is from May to December. Surfing is an emerging water sport in Sri Lanka that attracts both local and foreign tourists. The Arugam Bay area is known as the surfing capital of Sri Lanka. Lagoon and mangrove safaris are becoming popular in Sri Lanka, which is located in the tropical region. Whale watching tourism has recently become a popular sector in Sri Lanka. This activity is carried out especially in the coastal areas of Mirissa, Trincomalee and Kalpitiya.

The private sector is working to provide all the necessary facilities for tourists. The contribution of private operators to creating a conducive environment for surfing is very high. These operators provide surf training for beginners to people of various skill levels. This increases the income received from tourists and also helps to attract tourists back. If there are enough instructors, the safety of surfers is also ensured. Advertising for surfing in Sri Lanka is also often done by the private sector. Awareness is raised about surfing seasons, hotel facilities and gear rentals through websites, social media and travel agencies. Thus, it appears that the contribution of the private sector to promoting Sri Lanka as a surfing destination is very high.[6] The government has formulated the necessary rules and regulations to prevent damage to nature and minimize environmental pollution. The government and the private sector should work together towards sustainable development.

Water tourism experience

Information obtained from 116 foreign tourists who visited Sri Lanka is based on the 10 multiple choice questions in a Google Form formate and helps to formulate the main trends in water tourism sector from the customers' point of view. The majority of the tourists who participated in this survey represent the 25-34 age group. It is 33.6% as a percentage. The 35-44 age group is 31% as a percentage. Moreover, 70.7% of the respondents had visited Sri Lanka before. Only 29.3% of the tourists had visited Sri Lanka for the first time. This shows that tourists who have visited Sri Lanka are satisfied with Sri Lanka and return again. However, the lack of first-time tourists is clearly noticeable.

Previous water tourism experience

A majority of respondents, 81.9%, had engaged in water-based tourism activities. A very small number, 18.1%, had never engaged in water tourism activities before. This clearly shows that a majority of foreign tourists prefer water tourism activities. Furthermore, 62,1% of respondents expressed interest in white water rafting. Surfing and whale watching were chosen by 39,7% and 37,9% tourists respectively. Lagoon and mangrove safaris have been expressed by 34,5%. Scuba diving and snorkeling have very low interest, only 13,8% of respondents selected this option. This shows that tourists visiting Sri Lanka are more interested in rafting among water-based activities.

Factors for choosing water-based tourism activities in Sri Lanka

The majority of the respondents (62 tourists) commented on safety standards. The number of respondents who commented on the price to be paid and environmental responsibility was 42. The number of persons who chose water-based activities based on the factors of availability of information and recommendations/reviews was 33 and 35 respectively. The number of people who chose water-based activities based on the factors of accessibility and quality of equipment and guides was very low. This shows that tourists believe that safety standards in Sri Lanka are high. It is a good sign for the tourism industry. However, trust in the quality of equipment and tour guides is very low. Nevertheless, the respondents mostly preferred to engage in water tourism activities with a tour guide (57.8%), only 13.8% of tourists preferred to engage in water tourism activities alone without a tour guide. In turn, 28.4% of the respondents metioned that it depends on the business. Thus, it appears that there should be sufficient tour guides for water tourism activities.

Awareness of water-based tourism activities in Sri Lanka

The number of people who found information using social media is 37.9% and the number of people who found information through online search is 24.1%. That is, 62% have found information using digital media. The number of people who found information through travel agencies is 14.7% and the number of people who got information from friends and family members is 18.1%. The number of people who got information from the hotel where they are staying is very low. This figure shows 5.2%. This shows that attracting tourists using digital media is more practical and effective.

Water tourism in hotel owners' perspective

Five hotel owners were selected to cover five major water tourism activities in Sri Lanka and were asked ten questions and their responses were collected. The five main water tourism activities in Sri Lanka are covered by these interviews. The answers represent rafting, surfing, scuba diving, mangrove safari and whale watching sectors. The hotel owner who responded regarding rafting is named Respondent 1, the hotel owner who responded regarding surfing is named Respondent 2, the hotel owner who responded regarding scuba diving is named Respondent 3, the hotel owner who responded regarding mangrove safari is named Respondent 4, and the hotel owner who responded regarding whale watching is named Respondent 5.

The role of water tourism in shaping hotel business strategy

As respondent 1 noted, in addition to rafting, the hotel provides food and accommodation facilities. Therefore, tourists who come for rafting use those facilities. Respondent 2 has a similar idea. He states that those who come for surfing get food and accommodation facilities from the hotel. Respondent 3 mentioned that in addition to scuba diving facilities, food, accommodation and music are provided. Tourists who come for scuba diving also enjoy other facilities. As respondent 4

underlined, in addition to mangrove boat safaris, food and accommodation are now provided. Therefore, tourists also enjoy those facilities. Respondent 5 states that the main function of the institution is to provide boats for whale watching and provide road guides. Since no other facilities are provided, water tourism activities are the only source of income. This makes it clear that water tourism activities affect the determination of the other income sources of the hotel. By raising the standard of water tourism activities and providing satisfactory water tourism activities, the other income sources of the hotel can also be increased.

Main challenges

Respondent 1 noted that on certain days there is heavy traffic for rafting as tourists also come from other hotels. It is a hindrance to tourists. In opposite, Respondent 2 states that the main challenge is the decrease in the number of tourists. The hotel rooms are still empty. Respondent 3 mentioned that since recognized certificates are required for scuba diving, many tourists do not get the opportunity to dive. As respondent 4 marked, the mangrove is located quite far from the tourist town of Negombo. Therefore, the number of tourists is low. As respondent 5 states, the transportation facilities in the Kalpitiya area are poor and there are few good hotels. Therefore, the number of tourists is low. In order to reduce the congestion for rafting, alternative locations should be identified and developed. As an answer to the decrease in tourist attraction, digital media advertising is important and relationships with travel agencies are important. Institutions that can provide recognized certificates for diving should be established in Sri Lanka. They should be linked with international institutions. In places where transportation facilities are poor, it is important for the hotel to provide transportation facilities to tourists.

Proposals for the development of water tourism

As respondent 1 states, there is a problem with rafting today due to the large number of local tourists on certain days. To minimize this, more places for rafting should be found in the Kelani River. As respondent 2 underlined, surfing competitions etc. can be organized to attract tourists. Moreover, respondent 3 noted that tourism promotion programs are needed and opportunities should be provided to study those courses in Sri Lanka by connecting with institutions that provide international diving certification. As respondent 4 states, good advertising is needed to attract tourists. In turn, respondent 5 noted that awareness programs are needed since tourists' knowledge about the Kalpitiya area is very low. The points to be emphasized here are that good tourism promotion programs are needed, new water tourism places should be found and cooperation with international organizations should be worked on.

CONCLUSIONS

Based on the conducted research, a promotional program to boost water tourism, and broader strategic recommendations for it were designed. The aim of this program is to develop water tourism in Sri Lanka and thereby develop the overall tourism industry in the country. The Government of Sri Lanka must intervene in this regard as this program cannot be implemented by individuals or hotel owners alone.

- Identifying and developing previously untapped arears for water tourism

- Issuance of a digital ticket to tourists engaged in water tourism activities

- Introducing a digital map that makes water tourism destinations accessible

- Introducing a digital platform with live chat

- Using digital platforms for promotion

- Introducing loyalty programs

- Building the connections with international organizations that operate water tourism activities

(1) Identifying and Developing Previously Untapped Arears for Water Tourism

Rafting: According to the survey, the most preferred water tourism activity among foreign tourists is white water rafting. White water rafting requires rapid flows and gradient drops. These characteristics are found in the Kelani River in the Kitulgala area. Therefore, the Kelani River has been chosen for white water rafting. Currently, rafting is only conducted in the Kitulgala area of Sri Lanka, which is why there is a rush of local tourists. Therefore, it is important to find new places suitable for rafting. Below are some such places. Such as Mahaweli river (upper section), Seethawaka river (Avisswella), Kalu river (Rathnapura).

The upper reaches of the Mahaweli River, the longest river in Sri Lanka, offer the potential for white water rafting. The Mahaweli River flows through lush forests, offering scenic views. This section of the river features a mix of fast and slow water courses. Suitable for both beginners and experienced rafters. The rapids are particularly rapid during the rainy season, making for a thrilling rafting experience.

The Seethawaka River, which flows through Avissawella in the western part of Sri Lanka, offers potential for rafting. Both fast and moderate water courses are found here. You can enjoy the sport of rafting while watching calm pools, large bamboo trees, birds and tea plantations. Currently, rafting training is conducted in this area, but it is not open to tourists.

The Kalu River in Ratnapura offers excellent potential for white water rafting. The scenic surroundings and natural beauty offer tourists an unforgettable experience. During the rainy season, the river shows a more challenging flow. It is also more suitable for thrill seekers. Tourists also get the opportunity to explore the biodiversity.

Surfing: According to the survey, the second most popular activity among tourists is surfing. The Arugambay area is known as the surfing capital. Currently, the southern and eastern coasts of Sri Lanka are famous for surfing. However, there is not much surfing activity on the western coast. Although the western coast is not suitable for all surfing activities, it shows good potential for kite surfing. Although solo tourists are currently engaged in kite surfing on the western coast, it is still not a strong tourist attraction.

Lagoon and Mangrove Safari: Currently, the Madu River in the Balapitiya area of Sri Lanka is a popular destination for mangrove safaris. Although Negombo is a tourist city, mangrove safaris are not yet very popular among tourists. However, the beautiful surroundings and island areas of the Negombo lagoon provide a suitable potential for mangrove safaris.

(2) Issuance of a Digital Ticket to Tourists Engaged in Water Tourism Activities

A key finding of this study is the lack of accurate statistical data on water tourism participants in Sri Lanka. This situation creates a significant gap in tourism planning and development. Therefore, the researcher recommends the introduction of a digital ticket for tourists engaging in water tourism activities such as rafting, surfing, whale watching, scuba diving and mangrove boat safaris.

The digital ticket can be issued at the point of purchase of the water tourism facility. This can be done through a mobile application or through authorized service providers. This ticket can be prepared to include the country of origin, water tourism activity, location and date. This can be done through a digital platform under the management of the Sri Lanka Tourism Development Authority. Then the government can obtain true statistical data on tourists engaging in water tourism activities. This information will be very important for promoting tourist destinations, providing infrastructure, ensuring standards for water tourism activities and ensuring the safety of tourists. It can also minimize congestion in restricted areas and environmentally sensitive areas. By allowing only government-registered institutions and individuals to provide these services, illegal activities can be controlled. This can also be used as a digital tool for modernizing the water tourism industry.

(3) Introducing a Digital Map That Makes Water Tourism Destinations Accessible

In Sri Lanka, accessibility to destinations is a factor that enhances the tourist experience and increases repeat visits. According to the survey, the majority of tourists visiting Sri Lanka are in the 25-44 age group. This age group is often tech-savvy, uses digital tools, and has relatively high levels of technical knowledge. The researcher recommends introducing a comprehensive digital map covering all water tourism zones and destinations in Sri Lanka so that they can easily identify and access water tourism activities in Sri Lanka.

This interactive digital map should be accessible through a separate mobile application or a website. It should be created with GPS technology. Details of water tourism activities such as rafting, surfing, scuba diving, whale watching and mangrove boat safari should be included. Details of weather conditions in those areas, rules and regulations related to water sports and other services should be included. It is also important to link to hotels and places that provide accommodation facilities. User reviews should also be obtained and updated. Providing a user-friendly interface can create a desire for the tourist to use the mobile application. It will enable the tourist to identify uncrowded places and will also reduce congestion in water tourism activities. It will also help to achieve the Sustainable Development Goals.

(4) Introducing a Digital Platform with Live chat

About 79.3% of tourists visiting Sri Lanka are under the age of 44. Most of the people in this age group are digital natives. Also, most of the tourists visiting Sri Lanka have found information about water tourism activities online or by using social media. Hotel owners have also focused their attention on digital technology as they are using websites and social media to advertise. About 50% of the tourists who participated in the survey have commented that there is not enough information about water tourism. After studying all this information, the researcher considers the introduction of a digital platform with live chat and automated bots as a timely and practical solution.

This digital platform should enable tourists to connect with stakeholders in the tourism industry, including hoteliers. It can be used as a platform for users to report problems, ask questions and

provide immediate support. An automated bot facility can be implemented for common questions that arise, and a live chat system can be used for specific questions. A team of 6 or 7 trained professionals with expertise in water tourism is sufficient to implement the live chat. They should not only have the ability to solve problems related to water tourism, but also have the ability to provide correct guidance. Their role is important for service-related complaints, security issues and other humanitarian issues.

The creation of this platform should be done with the intervention of the government and the implementation and monitoring should definitely be done by the government. It is more appropriate to maintain this platform under the Sri Lanka Tourism Development Authority, which is the main institution in Sri Lanka related to tourism. Government involvement in this platform creates credibility for stakeholders and also affects the government's strategies. Information should also be collected on new trends, challenges and international standards in water tourism while solving immediate problems. This information will guide the government to implement water tourism policies, promote infrastructure facilities and improve service quality. The introduction of a digital platform operated by the government with the support of live chat and bots shows a new dimension in water tourism in Sri Lanka. This will provide an opportunity to communicate well with tourists and the feedback received can increase the attractiveness of the tourist experience and achieve sustainable growth of water tourism.

(5) Using Digital Platforms for Promotion

Individual hotel owners are already using social media to promote their activities. However, these efforts are limited and do not match the national need. A comprehensive promotion program using digital platforms such as social media, with government intervention, is needed to reflect the level of water tourism activities in Sri Lanka, including existing water tourism destinations and those with potential to be developed. Sri Lanka's water tourism potential can be informed to the world through a well-structured government-led digital marketing program. Experienced individuals should be involved in creating high-quality videos and this should be done under the guidance of the Sri Lanka Tourism Development Authority. Videos can be created that include activities related to water tourism, destinations, cultural identity and experiences of tourists. Popular platforms such as YouTube, Facebook and Instagram can be used to address global audiences. The promotion program can be launched by building collaborations with Sri Lankan tourism industry experts, international tourism industry experts, and social media influencers.

The Sri Lanka Tourism Development Authority should set up a separate unit for this. This unit should consist of digital marketers, content creators, social media managers and video artists with knowledge of tourism promotion. Content should be created that highlights the beauty and cultural value of Sri Lanka's water tourism destinations. These creations should be promoted through their platforms by connecting with famous video bloggers. The effectiveness of the promotion, audience participation, feedback, accuracy of information, etc. should be considered.

(6) Introducing Loyalty Programs

The survey revealed that a large number of tourists visiting Sri Lanka prefer water tourism activities and that many of the tourists who have visited return. To encourage these tourists to return, loyalty cards can be introduced as a way to reward them and reward them. This can be done under the guidance of the Sri Lanka Tourism Development Authority. A digital system can be established at the airport to identify such tourists and issue them a loyalty card.

Special packages for water tourism activities can be introduced for tourists holding this loyalty card. Discounts can be given in providing hotel facilities. Priority can be given in events organized by the government for tourists. Various strategies can be identified to implement this. The Sri Lanka Tourism Development Authority should start this work in partnership with a local technology company. Hotels, water tourism operators, and those involved in the water tourism sector should be integrated and participate in this program and the discounts they offer should be publicized. Tourists can be informed about this at the airport and registration for this program should be quick and free. A separate monitoring team should be appointed to review the progress of the program.

(7) Building the Connections with International Organizations that Operate Water Tourism Activities

Another suggestion for developing Sri Lanka's water tourism industry is to strengthen ties with international organizations involved in water tourism activities. Some organizations issue certificates for water tourism operators and some organize water tourism competitions. Maintaining ties with such organizations can instill confidence in Sri Lanka's water tourism industry among tourists.

The International Rafting Federation (IRF) operates globally for rafting. The IRF runs training programs, issues certificates, and organizes international competitions. Scuba diving is run by two recognized organizations: the Professional Association of Diving Instructors (PADI) and Scuba Schools International (SSI). Both of these organizations provide diving training and issue certificates. These certificates are also required to become a diving instructor. This allows the certificate holder to train, guide, and supervise divers. The International Surfing Association (ISA) operates globally for surfing. ISA sponsors training, events, and provides guidelines for the development of surfing competitions. ISA certification is required for training, maintaining, and judging surfing activities worldwide. Two main organizations operating for mangrove safari have been identified. The International Union for Conservation of Nature (IUCN) and Wetlands International are those organizations. These organizations provide support for environmental conservation research and ecotourism development. By engaging with these organizations, sustainable tourism in wetlands and mangrove ecosystems can be promoted. International whaling commission (IWC) and World Cetacean Alliance (WCA) are international organizations operating for whale watching tourism activities. They issue certificates and conduct awareness raising for whale watching.

The Sri Lanka Tourism Development Authority should work to engage and cooperate with these organizations. Although individual hotel owners sometimes have relationships with these organizations, it is not enough to achieve international recognition and organize international competitions in Sri Lanka. International recognition and the opportunity to organize international competitions in Sri Lanka will be achieved through state-level intervention.

REFERENCES

1. Arachchi, R. (2020). COVID - 19 and Tourism: Crisis and Challenges of Tourism Industry in Sri Lanka, Available:https://www.academia.edu/44516154/COVID_19_and_Tourism_Crisis_and_Challenges_of_Tourism_Industry_in_Sri_Lanka (Reviewed March 6, 2025)
2. Ceylon Digest. (2024). Sri Lanka Tourism surpasses 2023 tourist arrivals, Available:https://www.ceylondigest.com/sri-lanka-tourism-surpasses-2023-tourist-arrivals/ (Reviewed March 16,2025)

3. Colombo Gazette. (2020). Sri Lanka records 1.9 million tourist arrivals in 2019, Available: https://colombogazette.com/2020/01/07/sri-lanka-records-1-9-million-tourist-arrivals-in-2019/ (Reviewed March 12, 2025)

4. Gunathilaka, L. (2019). Water Tourism a New Strategy: Assessment of Water Quality, Landscape and Aesthetic Value of Selected Tourist Destinations in Ingiriya, Sri Lanka Available: https://www.academia.edu/42099551/WATER_TOURISM_A_NEW_STRATEGY_ASSESSMENT_OF_WATER_QUALITY_LANDSCAPE_AND_AESTHETIC_VALUE_OF_SELECTED_TOURIST_DESTINATIONS_IN_INGIRIYA_SRI_LANKA (Reviewed March 13, 2025)

5. High Commission of the Democratic Socialist Republic of Sri Lanka in the United Kingdom. (2023). SL Tourism Statistics, Available: https://srilankahc.uk/sl-tourism-statistics/ (Reviewed March 13, 2025)

6. Samuels, Z. (2025). The Ultimate Surfing in Sri Lanka Guide: Carving the Best Beaches, Available: https://www.thebrokebackpacker.com/surfing-in-sri-lanka-guide/ (Reviewed April 30, 2025)

7. Silva, Ch. (2025) Tourist arrivals grow by 38% to 2 m in 2024, Available:https://www.ft.lk/front-page/Tourist-arrivals-grow-by-38-to-2-m-in-2024/44-771305 (Reviewed March 13, 2025)

8. Xinhua, (2019). Sri Lanka receives 2.3 million tourists in 2018, Available:http://www.xinhuanet.com/english/2019-01/03/c_137717368.htm (Reviewed March 17.2025)

TRENDS AND FACTORS INFLUENCING THE CONSUMPTION OF PREMIUM ALCOHOL IN EUROPEAN MARKET

Farrukh Mirakhmedov, Latvia
Baltic International Academy, Riga
Business Management and Adminstration departament
farrukh.mir93@gmail.com
Scientific tutor: Dr.oec, as. prof. Alla Iljina

ANOTĀCIJA

Šajā rakstā aplūkoti faktori, kas ietekmē augstākās kvalitātes alkohola patēriņu Eiropas tirgū. Ienākumu līmenis, vecums, izglītība un dzīvesveids būtiski ietekmē patērētāju uzvedību. Jauni, labi izglītoti cilvēki ar augstākiem ienākumiem biežāk izvēlas premium klases produktus. Digitālā mārketinga loma un premiumizācijas tendence norāda uz pieaugošu orientāciju uz kvalitāti.

Atslēgvārdi: Premium alkohola patēriņš, Eiropas tirgus, Tirgus tendences, Zīmolu stratēģijas

ABSTRACT

The article examines the main factors influencing premium alcohol consumption in the European market. Income level, age, education, and lifestyle significantly affect consumer behavior. Younger, well-educated individuals with higher incomes show a preference for premium products. The role of digital marketing and the trend of premiumisation highlight a growing-shift toward quality-oriented consumption.

Keywords: Premium alcohol consumption, European market, Market trends, Brand strategies, Market segment

IEVADS. INTRODUCTION

In recent years, the premium alcohol segment has shown steady growth within the European market. Despite increasing public awareness of healthy lifestyles and the existence of strict regulations on alcohol advertising, many consumers continue to choose high-quality alcoholic beverages. Premium alcohol, as a symbol of social status and quality, plays a significant role not only in individual consumer preferences but also in the overall profitability of hospitality businesses, particularly in restaurants and bars [1].

The relevance of this research lies in the growing demand for premium products, influenced by rising living standards, digital culture, and changing consumer values. At the same time, alcohol marketing remains subject to considerable legal and reputational constraints, which makes understanding consumer behavior in this segment particularly important. Identifying the trends and key drivers behind the consumption of premium alcoholic beverages will help companies develop more targeted and responsible marketing strategies [2].

Problem: while the premium alcohol market continues to expand, alcohol brands face a dilemma: how to successfully promote premium products in a highly regulated and socially sensitive environment. This issue presents a significant challenge for marketers operating in Europe, where advertising restrictions and changing social attitudes toward alcohol demand a more nuanced approach.

The aim of this study is to analyse current trends and identify the main factors that influence the consumption of premium alcoholic beverages in the European market. By focusing on consumer behavior, the research seeks to shed light on the driving forces behind the growing demand for

high-end alcohol. The object of this research is the consumers of premium alcoholic beverages in the European market. The subject is the trends and key factors influencing the consumption of premium alcohol in Europe.

In order to achieve the stated aim, the following tasks are set:

- To identify the socio-economic and cultural factors influencing consumer decisions.
- To explore recent trends that encourage the consumption of premium alcohol.
- To examine marketing strategies used by companies to promote premium alcoholic beverages in Europe.

This study employs desk research, including the analysis of recent academic literature, market reports, and case studies, to identify prevailing consumption patterns and marketing practices within the premium alcohol segment.

Research Questions:

- To guide the investigation, the following research questions are proposed:
- What are the main factors affecting consumer behavior regarding premium alcohol in the European market?
- Which marketing strategies are perceived as most effective in influencing consumer choices?

It is hypothesized that the consumption of premium alcoholic beverages in Europe is largely influenced by the consumer's socio-economic status-particularly high income and professional position.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

Overview of the European Premium Alcohol Market

The European market for alcoholic beverages is currently undergoing a significant transformation, characterized by a well-documented trend towards premiumisation across diverse product categories. This premium segment is increasingly vital to the overall drinks industry, demonstrating consistent growth and resilience even amidst broader societal shifts towards health consciousness. Market data confirms this positive trajectory, indicating a consumer shift towards prioritizing quality, often expressed through the 'drink less, but better' philosophy.

Defining "premium" in this context extends significantly beyond just elevated price points. It incorporates a complex blend of tangible and intangible factors signaling superior value. Key elements often include demonstrable product quality, evidence of craftsmanship, exclusivity, and the status consumers associate with the product. Furthermore, attributes such as a rich heritage or compelling brand story, along with the promise of a unique or memorable consumption experience, are increasingly central to a brand's premium positioning [3].

Several interconnected factors are driving this evolution in consumer preference. Rising disposable incomes within key European demographics provide the financial capacity for purchasing higher-priced goods. Concurrently, market research highlights evolving consumer values, with an increasing emphasis placed on authenticity and experiences over simple possessions, fuelling demand for premium offerings [4].

From a strategic perspective, the premium segment holds considerable weight for industry participants. Products within this tier typically yield higher profit margins and are instrumental in building long-term brand equity and shaping a positive brand image. Successfully competing often requires sophisticated strategic brand management and meticulous management of the price-value perception. Furthermore, innovation often flourishes within the premium market, influencing wider

industry trends, including the crucial role of packaging aesthetics in conveying luxury and quality to the consumer [5].

Consumption Statistics and Market Segmentation

Recent market evaluations for alcoholic beverages within Europe indicate a generally positive direction and sustained trajectory specifically for higher-value, premium product segments. This expansion is often more pronounced in terms of market value growth rather than significant increases in sheer consumption volume, suggesting a fundamental shift in consumer purchasing habits. This observation aligns strongly with wider discussions about changing consumption patterns, where factors beyond simple quantity, such as perceived quality, brand status, and the overall consumption experience, are increasingly prioritized by consumers. Consequently, even if total alcohol intake per capita remains stable or shows only modest growth in certain regions, the premium tier often demonstrates robust financial performance, contributing significantly to the overall value expansion observed across major European economies and reflecting a clear preference evolution among key consumer groups.

Market Segment	Metric	2022 vs 2021	2023 vs 2022
Premium Alcohol Segment	Value Growth	+7.0%	+6.1%
	Volume Growth	+1.9%	+1.6%
Non-Premium Alcohol Segment	Value Growth	+1.5%	+0.8%
	Volume Growth	-1.0%	-1.5%
Total Alcohol Market	Value Growth	+3.5%	+2.8%
	Volume Growth	-0.2%	-0.5%

Table 1: Illustrative Comparison of Growth Rates: Premium vs. Non-Premium Alcohol Segments in Europe [6].

Developing targeted and resonant marketing approaches necessitates a deep and nuanced understanding of the diverse consumer base interested in premium alcohol. Effective market segmentation, therefore, becomes a cornerstone of strategic planning for brands operating within this competitive space. Frameworks for strategic brand management consistently emphasize the critical importance of identifying distinct consumer groups based on shared characteristics, motivations, and behaviours. This allows companies to tailor not only their product offerings but also their communication strategies and channel management, thereby enhancing relevance, building stronger customer relationships, and ultimately improving overall market performance and competitiveness within the distinct premium category [7].

The European premium alcohol consumer base is notably heterogeneous, requiring segmentation beyond simple categorization. While demographic factors such as specific age cohorts and income levels certainly play a significant role in determining purchasing power and influencing brand preference, they often provide only a partial picture. For instance, studies focusing specifically on younger generations like Millennials and Gen Z highlight not just their financial capacity but also a distinct set of values influencing their consumption. These cohorts often demonstrate a preference for brands that align with their personal values, show transparency, engage authentically through digital platforms, and offer experiences that go beyond the product itself, making purely demographic targeting insufficient for capturing their loyalty [8].

Psychographic and behavioral segmentation offers crucial additional layers for understanding consumer motivations in the premium alcohol market. Lifestyle choices, personal aspirations, and deeply held values, including a demonstrably growing interest in sustainability, ethical sourcing, and corporate social responsibility, significantly impact brand selection among conscientious consumers. These individuals actively seek brands whose purpose aligns with their own, often verifying claims and favouring transparency in production and business practices. This value-driven approach is becoming increasingly prevalent, demanding that brands articulate and demonstrate their commitment to broader societal and environmental goals to resonate effectively with these important consumer segments [9].

Furthermore, the intrinsic desire for unique activities, sensory pleasure, and moments of indulgence represents a powerful driver of premium consumption. This aligns with established theories of hedonic consumption, where the focus shifts towards the emotional responses, aesthetic appreciation, and overall enjoyment derived from the act of consuming, rather than purely functional benefits. Premium alcoholic beverages, with their often complex flavour profiles, sophisticated presentation, and association with special occasions or self-reward, cater directly to these hedonic motivations. Understanding the specific triggers and contexts for such indulgence allows brands to position their products more effectively as tools for achieving desired emotional and sensory experiences.
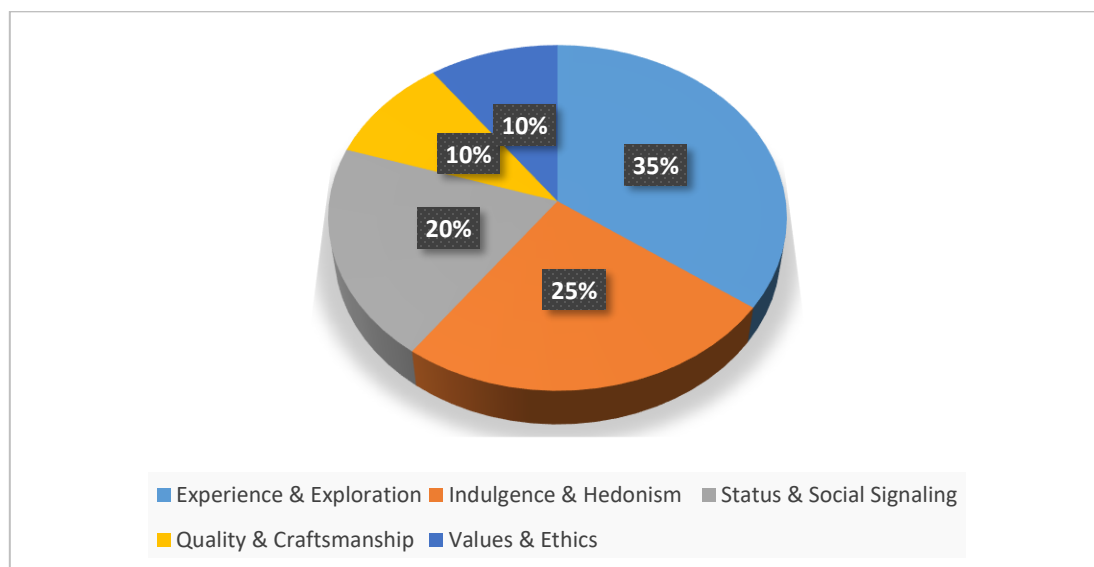
Figure 1: Diagram illustrating Key Consumer Motivations for Premium Alcohol Purchase [10]

Finally, the evolving landscape of distribution channels and geographic specificities add further dimensions to market analysis. Consumption patterns and the maturity of the premium market can vary considerably across different European countries and regions, requiring localized strategies. Simultaneously, the proliferation of digital platforms has revolutionized how consumers discover, research, and purchase premium alcohol. E-commerce sites, dedicated brand DTC platforms, and social media channels offer unprecedented convenience, wider selection, personalized recommendations, and new avenues for brand engagement, fundamentally changing the traditional dynamics between on-trade and off-trade environments and requiring brands to develop sophisticated omnichannel strategies [11].

Factors Influencing Premium Alcohol Consumption

The decision-making process underpinning the purchase and subsequent consumption of premium alcoholic beverages within the complex European marketplace is demonstrably multifaceted. It is influenced by a dynamic interplay of interconnected drivers that span socio-economic conditions, deep-seated psychological motivations, prevailing socio-cultural norms, and targeted marketing interventions. Understanding these constituent factors is crucial for accurately comprehending contemporary consumer behaviour patterns in this specific high-value segment. While analyzing each factor provides insight, it is often their synergistic interaction that shapes the final purchase decision, making a holistic view necessary for effective market analysis and strategy development within the premium alcohol industry.

Socio-economic status consistently emerges as a foundational determinant influencing access to and preference for premium alcohol. Higher levels of disposable income naturally provide the essential financial capacity required to afford products positioned at significantly higher price points, acting as a primary gateway to the segment. Beyond mere affordability, premium alcoholic beverages frequently function as potent symbols of social standing, professional success, or cultivated personal taste, thereby aligning with the aspirational goals and lifestyle expectations prevalent among affluent consumer segments across Europe. Furthermore, educational background often correlates positively with a propensity towards premium consumption, potentially linked to increased cultural capital, greater exposure to diverse offerings, or a heightened appreciation for the complex product attributes, provenance narratives, and nuanced quality indicators often emphasized by premium brands in their marketing communications [12].

Psychological motivations exert a profound influence, extending far beyond rational economic considerations. The inherent pursuit of sensory pleasure, personal enjoyment, moments of indulgence, and overall gratification – commonly conceptualized within the framework of hedonic consumption – represents a primary underlying driver for selecting premium beverages. These products are typically marketed, and perceived, as offering a superior taste profile, a more refined sensory experience, or a means to elevate an ordinary occasion into something special, thereby fulfilling consumers' desires for pleasure and self-reward. This resonates strongly with the concurrent cultural shift towards valuing unique and memorable experiences, often termed the 'experience economy', where the context, associated rituals, brand storytelling, and overall ambiance surrounding the consumption act significantly amplify the product's perceived value and desirability for experience-seeking consumers.

Premium brands also serve crucial psychological functions related to identity construction and the mitigation of perceived purchase risk. The conscious choice of specific premium labels allows individuals to articulate and project their desired self-image, signal affiliation with admired social groups, or express alignment with the specific values and lifestyle connotations cultivated by the brand through its marketing efforts. Simultaneously, particularly for consumers less familiar with a category or seeking guaranteed satisfaction, selecting established and reputable premium brands can act as a heuristic for quality assurance. This reduces the perceived risk associated with the purchase decision compared to potentially inconsistent or less satisfactory experiences with unknown or lower-tier alternatives, offering consumers confidence in their choice [13].

Socio-cultural factors provide an essential contextual layer influencing consumer behaviour regarding premium alcohol. Peer groups, immediate social circles, and broader reference groups can exert considerable influence on individual purchasing intentions, especially for products like premium beverages that are often consumed in socially visible settings where brand choice can function as a non-verbal communication tool. Explicit research focused on the premium alcohol segment confirms that social group dynamics, including normative pressures towards conformity or aspirations towards distinction, play a statistically significant role in shaping consumers' intentions to purchase these higher-priced options. Furthermore, enduring cultural traditions related

to gifting premium spirits or wines for significant life events or specific festive occasions also contribute substantially to sustaining demand within particular European societies [14].

Finally, specific elements within the marketing mix, when strategically deployed by brands, demonstrably shape consumer perceptions, preferences, and ultimate purchase behaviour in the premium alcohol sector. Strategic branding initiatives, encompassing consistent messaging, the effective communication of brand authenticity or heritage, and the creation of aspirational brand imagery, are fundamental for building perceived value that justifies the inherent price premium. Furthermore, packaging design and aesthetics serve as critical visual cues at the point of sale, powerfully conveying notions of luxury, quality craftsmanship, and brand personality, thereby significantly influencing initial consumer perceptions and purchase likelihood. The effective use of digital marketing channels, including targeted social media campaigns and collaborations with relevant online influencers, is also increasingly vital for reaching specific consumer demographics and building brand consideration within the constraints of European advertising regulations [15].

Contemporary Trends Shaping the Market

The European premium alcohol market operates within a dynamic environment, continually influenced by evolving consumer preferences, significant technological advancements, and broader societal shifts that redefine value and engagement. One of the most dominant and persistent forces remains the overarching trend of **premiumisation**. This is characterized by a discernible consumer tendency across various demographics to prioritize higher-quality, often higher-priced, alcoholic beverages over sheer volume consumption. This fundamental shift reflects a complex combination of factors, including increased disposable income in certain segments, a growing appreciation for craftsmanship and provenance, and a desire for more elevated or meaningful consumption experiences rather than simple intoxication. This trend continues to reshape category dynamics, compelling brands across spirits, wine, and even beer segments to innovate and justify their premium positioning through tangible and intangible value cues.

Closely intertwined with premiumisation is the expanding influence of the **experience economy**. Contemporary consumers, particularly younger cohorts like Millennials and Gen Z, increasingly demonstrate a preference for purchasing memorable experiences rather than solely accumulating material goods. Premium alcohol brands are strategically leveraging this societal shift by focusing intently on the entire consumption journey – from unique serving rituals and signature cocktails developed for on-trade environments to immersive brand home visits (distilleries, wineries), exclusive product launches, and engaging digital storytelling. This focus on experiential marketing aims to build deeper emotional connections, foster communities around the brand, and create perceived value that extends far beyond the liquid in the bottle, ultimately enhancing customer loyalty and advocacy in a crowded marketplace [16].

The **digital transformation** continues to profoundly reshape how consumers discover, research, purchase, and interact with premium alcohol brands. The accelerated growth of e-commerce platforms and direct-to-consumer (DTC) sales channels, particularly for wine and specialized spirits, offers unprecedented convenience, wider product selection, access to exclusive releases, and opportunities for personalized recommendations and communication. Concurrently, digital marketing strategies, encompassing sophisticated social media engagement, precisely targeted online advertising campaigns leveraging consumer data, and strategic collaborations with credible digital influencers, have become indispensable tools for reaching specific consumer segments, building brand awareness, and driving consideration, especially among digitally native younger generations who rely heavily on online sources for information and inspiration.

Heightened **health and wellness consciousness** across European societies exerts a paradoxical influence on the premium alcohol market. While contributing to an overall moderation

trend or decline in per capita alcohol consumption, it simultaneously reinforces the 'drink less, but better' ethos that directly fuels premiumisation. Consumers actively seeking moderation are often more willing to spend more per serving on a high-quality product for occasional indulgence. This trend also manifests in growing consumer demand for greater transparency regarding ingredients, production methods, and even nutritional information. Furthermore, it drives significant innovation and growth within the premium low-and-no-alcohol (LONO) category, catering to health-conscious individuals unwilling to compromise on taste, brand experience, or social participation [17].

Finally, consumers increasingly expect brands, particularly those in the premium space, to demonstrate genuine commitment to **sustainability, ethical practices, authenticity, and a clear brand purpose** beyond profit generation. Driven especially by the values of younger consumers, there is a growing demand for transparency regarding environmental impact (from sourcing to packaging), ethical treatment of labor throughout the supply chain, meaningful community engagement, and authentic brand narratives often rooted in heritage or specific values. Brands that can credibly communicate their positive contributions in these areas and integrate purpose into their core identity are increasingly finding this a powerful differentiator and a key driver of consumer preference and loyalty among value-aligned individuals who seek to make more conscious consumption choices. The visual communication of quality and luxury through **innovative and aesthetically pleasing packaging** also remains a critical factor in capturing attention and conveying premium cues in a competitive retail environment [18].

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

This section synthesizes the key findings derived from the comprehensive desk research conducted on the trends and factors influencing premium alcohol consumption within the European market. The evaluation focuses on addressing the specific research questions posed in the introduction and assessing the validity of the initial hypothesis concerning the influence of socio-economic status. The analysis draws upon the theoretical framework and market insights established in the preceding chapter, integrating findings from academic literature, industry reports, and market analyses to provide a cohesive overview of the current landscape.

1. Main Factors Affecting Consumer Behavior

The first research question sought to identify the principal factors affecting consumer behavior regarding premium alcohol in the European market. The analysis confirms that consumer choices in this segment are not driven by a single determinant but rather by a complex constellation of interacting factors. Socio-economic status emerges as a crucial enabling factor; higher disposable income levels grant consumers the financial capacity to purchase premium goods, while associated professional positions or social aspirations often create a motivation to consume products perceived as markers of success, status, or refined taste. Educational attainment also appears to play a role, potentially correlating with a greater appreciation for product complexity, heritage narratives, or the nuanced quality cues frequently employed by premium brands in their marketing and positioning strategies across Europe.

Beyond the foundational influence of socio-economic positioning, deep-seated psychological motivations significantly shape consumer preferences and purchase decisions within the premium alcohol category. The pursuit of sensory pleasure, personal indulgence, enjoyment, and overall gratification – concepts central to hedonic consumption theories – represents a powerful underlying driver. Premium beverages are often explicitly or implicitly marketed as offering a superior taste profile, a more sophisticated sensory experience, or a means to transform an ordinary

moment into one of indulgence or celebration. This aligns closely with the broader cultural shift towards valuing unique and memorable experiences, where the context, associated rituals, and the overall narrative surrounding consumption significantly enhance the perceived value and desirability of the product for consumers seeking more than just functional benefits [19].

Furthermore, the socio-cultural environment provides an essential context that frames consumer choices regarding premium alcohol. Peer groups, professional networks, and broader social circles exert considerable influence, particularly for beverages consumed in socially visible settings where brand selection can function as a form of social signaling or identity expression. Academic research specifically investigating the premium alcohol sector corroborates the significant impact of social group dynamics, including normative influences and aspirational desires, on consumers' stated intentions to purchase these higher-priced options. Additionally, established cultural traditions related to gifting premium spirits or wines for significant life events, professional milestones, or specific festive periods also contribute materially to the sustained demand for premium alcohol products within various European national and regional cultures [20].

2. Effective Marketing Strategies

The second research question focused on identifying marketing strategies perceived as most effective in influencing consumer choices within the competitive and often heavily regulated European premium alcohol market. The review suggests that success hinges on strategies that build perceived value beyond the product itself and resonate with the complex motivations identified earlier. Foundational to this is strategic brand management, encompassing the development of a clear brand identity, consistent messaging across touchpoints, and often, the leveraging of authentic heritage or compelling origin stories to create differentiation and emotional connection. Effective branding aims to construct perceived superiority and justify the price premium in the consumer's mind, fostering loyalty and preference over competitors.

In conjunction with strong branding, the tangible element of packaging design plays a disproportionately critical role in the premium segment. Packaging aesthetics serve as a primary visual heuristic at the point of purchase, powerfully communicating notions of luxury, quality, craftsmanship, and brand personality before the consumer even tastes the product. Innovative, sophisticated, and visually appealing packaging can significantly influence initial perceptions, drive trial, reinforce premium positioning, and act as a key differentiator on crowded retail shelves or back bars. Investment in high-quality packaging materials and design is therefore often considered a crucial component of the marketing mix for premium alcohol brands seeking to capture consumer attention and convey superior value effectively [21].

Moreover, contemporary marketing effectiveness increasingly relies on integrating experiential elements and leveraging digital channels strategically. Creating memorable brand experiences – whether through immersive distillery tours, curated tasting events, partnerships with high-end hospitality venues, unique serving rituals, or engaging online content – caters directly to the consumer desire for experiences and fosters deeper brand engagement. Simultaneously, a sophisticated digital presence is essential. This includes utilizing e-commerce and DTC platforms for sales and relationship building, employing targeted social media campaigns, collaborating authentically with credible digital influencers, and using data analytics to personalize communication. Increasingly, brands are also finding it effective to communicate a genuine commitment to sustainability and ethical practices, aligning with the values of key consumer segments [22].

3. Evaluation of the Hypothesis

The study's initial hypothesis posited that *the consumption of premium alcoholic beverages in Europe is largely influenced by the consumer's socio-economic status — particularly high income and professional position*. The findings derived from the literature review provide

substantial support for this hypothesis, confirming its centrality. Multiple analyses consistently highlight the critical role of higher disposable income as a key enabler, granting access to the premium market. Furthermore, the frequent association of premium alcohol consumption with professional success, social aspirations, and status signaling directly links purchasing behaviour to socio-economic standing, confirming it as a powerful, often primary, driver in this specific market segment across various European contexts.

However, while the hypothesis is strongly supported as a central influencing factor, the evaluation also underscores that socio-economic status alone does not provide a complete explanation for consumption patterns. The research clearly demonstrates that psychological factors (such as the pursuit of hedonic pleasure, the desire for unique experiences, and identity expression) and socio-cultural influences (including peer group dynamics and cultural traditions) interact significantly with economic capacity. These non-economic factors heavily shape *which* specific premium brands are chosen, *when*, and *why*. Effective marketing strategies further modulate these choices. Therefore, the hypothesis is confirmed as a crucial element, but its explanatory power is greatest when considered within the broader, interconnected framework of psychological, social, and marketing influences identified in this study.

3.4. Overall Evaluation of Results

The comprehensive desk research undertaken for this study successfully identified and analyzed the key contemporary trends shaping the European premium alcohol market, including the pervasive influence of premiumisation, the rise of the experience economy, the transformative impact of digitalisation, and the growing importance of health, wellness, and sustainability considerations. The findings consistently highlight a discernible shift in consumer behaviour towards more quality-oriented, value-driven, and experience-seeking consumption patterns within the alcohol category. Consumers increasingly seek not just a beverage, but a narrative, an experience, a reflection of their identity, or an alignment with their personal values [24].

The results underscore the inherent complexity of this market, presenting both significant opportunities for value creation and considerable challenges for brand marketers. Success in this environment necessitates navigating a landscape populated by increasingly discerning and informed consumers, operating within a framework of significant regulatory constraints specific to alcohol promotion, and responding authentically to evolving societal values around responsibility and purpose. The convergence of the identified factors strongly suggests that effective and sustainable strategies require a holistic, integrated approach. This involves combining robust branding, compelling experiential marketing, sophisticated digital engagement, and transparent communication of brand values, all underpinned by a deep, data-informed understanding of target consumer segments and their multifaceted motivations. While this desk research provides a valuable overview based on current literature and reports, future empirical research focusing on specific European regions or consumer typologies could further validate and enrich these findings.

KOPSAVILKUMS. CONCLUSION

This study examined the dynamic European market for premium alcoholic beverages, analyzing current trends and the primary factors shaping consumer choices. The research confirms the significant and ongoing trend of premiumisation, where consumers increasingly favour quality, value, and experience over mere quantity. Key drivers identified include evolving consumer values emphasizing authenticity and experiences, the pervasive influence of digital channels, and the foundational role of socio-economic factors, all interacting within the specific regulatory and social context of alcohol marketing.

The findings demonstrate that consumer behaviour in this segment results from a complex interplay of influences. While higher socio-economic status provides the necessary access and often the initial motivation for purchasing premium products, confirming the study's hypothesis in principle, it operates in conjunction with powerful psychological drivers like hedonic desires and identity expression, as well as significant socio-cultural factors such as peer influence and tradition.

Effective marketing strategies in this environment require a sophisticated approach. Building strong brand narratives, leveraging heritage, utilizing high-quality packaging aesthetics, embracing experiential marketing, and developing robust digital engagement strategies are crucial for success. Furthermore, demonstrating genuine commitment to sustainability and brand purpose is becoming increasingly important for resonating with contemporary consumer values.

In essence, the European premium alcohol market offers significant opportunities but demands a nuanced understanding of its complexities. Brands must navigate discerning consumer expectations, regulatory limitations, and evolving societal norms by offering holistic value propositions that blend quality, experience, digital convenience, and authentic purpose. Future research could further illuminate these dynamics by exploring specific national market differences or consumer typologies within Europe.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. IWSR Drinks Market Analysis. (2023). *Global Drinks Market: Trends and Forecasts 2023-2027*. [Industry Report].
2. Radoš S. (2023). Efectiveness of Regulatory Policies on Online/Digital/ Internet-Mediated Alcohol Marketing: a Systematic Review.
3. Rey R. D.Loose S. (2023). State of the International Wine Market in 2022: New market trends for wines require new strategies.
4. KPMG. (2023). *European Consumer Insights: Segmenting the Modern Drinker*. [Consulting Report].
5. Kapferer, J. N. (2023). *Kapferer on Luxury: How Luxury Brands Can Grow Yet Remain Rare* (2nd ed.). Kogan Page.
6. Sichtmann, C., & Diamantopoulos, A. (2023). The impact of packaging aesthetics on consumer perceptions of luxury brands. *Psychology & Marketing*, *40*(5), 933-949.
7. Pine & James. (2021). *The Experience Economy: Competing for Customer Time, Attention, and Money* (Updated Ed.). Harvard Business Review Press.
8. Deloitte. (2023). *Gen Z and Millennials Survey: Living and Working with Purpose*. [Global Survey Report].
9. Accenture Strategy. (2022). *From Purpose to Impact: The Path to Sustainable Consumption*. [Consulting Report].
10. Batra, R., & Kazmi, S. H. H. (2020). Hedonic consumption: A review and research agenda. *Journal of Business Research*, *118*, 201-210.
11. Euromonitor International. (2023). *Digital Consumer Survey: Trends in Online Beverage Alcohol Purchase*. [Industry Analysis].
12. Bai Y.Grignon M. (2024). Why do drinkers earn more? Job characteristics as a possible link. Health Economics.
13. Chambers T.Royds T.Jones A. C. (2023). The nature and extent of outdoor alcohol marketing in Wellington, New Zealand: a longitudinal audit and spatio-temporal analysis of outdoor alcohol marketing.
14. Cunningham, N. (2023). The role of social group influences when intending to purchase premium alcohol. *Cogent Social Sciences*, *9*(1), 2174093. https://doi.org/10.1080/23311975.2023.2174093
15. Lou, C., & Yuan, S. (2021). Influencer Marketing: How Message Value and Credibility Affect Consumer Trust of Branded Content on Instagram. *Journal of Interactive Advertising*, *21*(1), 58-73.
16. Rey R. D.Loose S. (2023). State of the International Wine Market in 2022: New market trends for wines require new strategies.
17. Anderson P.Kokole D.Llopis E. J. (2021). Production, consumption, and potential public health impact of low-and no-alcohol products: Results of a scoping review.
18. Clement, J. (2020). How visual packaging design elements affect perceived product quality and brand preference. *Journal of Retailing and Consumer Services*, *53*, 101971.

19. Xu A.Li Y.Donta P. K. (2024). Marketing Decision Model and Consumer Behavior Prediction With Deep Learning.
20. Staub C.Siegrist M. (2022). How health warning labels on wine and vodka bottles influence perceived risk, rejection, and acceptance.
21. Tony Joseph K ADr. Kannan S. (2024). Advertising and Marketing Strategies of Alcohol Brands at BharatGP: Assessing Awareness among Riders and Attendees.
22. Pineda N. (2023). Digital Media Marketing of Alcohol, Marijuana, and Tobacco to Black, Indigenous, and Youth of Color.
23. Keller, K. L. (2023). *Strategic Brand Management: Building, Measuring, and Managing Brand Equity* (5th Global Ed.). Pearson.

THE ROLE OF SOCIAL MEDIA IN PROMOTING LOCAL BUSINESSES IN CAMEROON: A COMPREHENSIVE LITERATURE REVIEW

Grevy Dinang Nzeuakou, Cameroon,
Baltic International Academy, Riga branch,
Master student,
Enterprise Management in the Leisure and Entertainment Industry,
Email: gdinang@gmail.com

ABSTRACT

This literature review focuses on the role of social media in promoting local businesses with a specific attention on the Cameroonian market. The study uses the PRISMA[1] 2020 framework to structure its methodology, screening 18 studies from 94 records. The study's objective is to understand how social media impacts business growth by identifying challenges and highlighting opportunities. Its main findings reveal that social media enhances business visibility, creates better interactivity with customers and is useful for employee recruitment. However, several barriers hinder the full potential of social media adoption, including limited digital literacy and lack of infrastructure.

Keywords: Business growth, Cameroon, local businesses, social media, social media marketing

INTRODUCTION

Today, the role of digital marketing in business is crucial. Our focus is the Cameroonian market. This market faces difficulties such as poor digital literacy and lack of infrastructure. [1,6].

Customers use social media to learn about products and services, in order to make their purchasing decisions. Therefore, understanding how local businesses effectively handle this tool is very important for economic development. [2].

Our research aims to fill the existing gap in the literature by analyzing Cameroon's unique market, with a systematic literature review.

METHOD

This research used a structured literature review adopting the PRISMA 2020 framework to analyze the impact of social media in promoting local business in Cameroon. In April 2025, a database search conducted on Google Scholar, Scopus, JSTOR, AJOL, PubMed, and Theseus.fi (2015–2025) generated 94 records; the screening process produced 18 studies based on relevance to SMEs[2], social media use, and Cameroonian context. Three key categories were set manually and thematically for data organization: platforms used, business impacts, and adoption challenges.

The study limitations include reliance on secondary data with the risk of publication bias. Additionally, to avoid translation bias, research was conducted only using English-language literature with possible omission of relevant literature in other languages.

---

[1] **PRISMA** stands for **Preferred Reporting Items for Systematic Reviews and Meta-Analyses**. It's an evidence-based **methodological framework** used to **improve the transparency, consistency, and quality** of systematic literature reviews.
[2] SMEs**: Small and Medium-sized Enterprises**.

RESULTS

The structured literature review shows four key findings on the role of social media in promoting local businesses in Cameroon:

- Local businesses in Cameroon use platforms like Facebook, WhatsApp and Instagram, to market, make direct sales and offer customer service. Active engagement on these platforms increases loyalty and recognition of brands. [4].
- Social media strategies lead to higher sales and revenue. They also increases collaboration opportunities. [3].
- 56% of SME owners in Cameroon confirm that social media is important/very important for business growth. [3].
- Social media has also been reported to be useful for employee recruitment: 77% of companies use social media for recruiting. [5].

Several barriers hinder the full potential of social media adoption by local businesses. The main challenges faced by SMEs in Cameroon are 32% for inadequate internet skills, 24% for high cost of internet access and 20% for slow internet connectivity. [4]. Poor infrastructure and unreliable electricity services degrade internet quality, while mobile internet penetration remains concentrated in urban areas. Additionally, there is a lack of formal training in the area of digital marketing. [6].

DISCUSSION

To address the aforementioned challenges and to optimize social media's potential, Cameroon must equip itself with the latest generation of internet communication infrastructure. Local companies must train their employees in the use of digital marketing. In addition to this, policymakers must consider reducing smartphones and internet connection costs to make them accessible to populations in the countryside. Finally, digital marketing must be taught in primary and secondary schools.

CONCLUSIONS

This review shows a significant role of social media in promoting local businesses particularly in terms of visibility and sales. However, to optimize social media's potential, stakeholders, public authorities and private actors must take effective measures to overcome the problems of internet connection quality, the cost of smart devices, the cost of internet connection and the mastery of digital marketing by local business managers.

REFERENCES

1. Bougna, T., & Noumba Um, P. (2022). The economics of infrastructure in Cameroon: State, challenges, and policy reforms. In C. Monga (Ed.), *The Oxford Handbook of the Economy of Cameroon*, pp. 197-226. Oxford University Press. [Online] Available from https://academic.oup.com/edited-volume/45500/chapter/392461349 [Reviewed April, 2025]

2. DataReportal. (2023). *Digital 2023: Cameroon*. [Online] Available: https://datareportal.com/reports/digital-2023-cameroon [Reviewed April 4, 2025]

3. Etoundi, R. A., Onana, F. S. M., & Olle, G. D. O. (2016). Development of the digital economy in Cameroon: Challenges and perspectives. *The Electronic Journal of Information Systems in Developing Countries*, 72(1), pp. 6,8 [Online] Available: https://onlinelibrary.wiley.com/doi/pdf/10.1002/j.1681-4835.2016.tb00558.x [Reviewed April 4, 2025]

4. Kanjo, M. A. (2018). *The Role of Social Media in Small and Medium Size Enterprises: A Comparative Analysis of Cameroon and Finland.* Centria University of Applied Sciences, pp. 23, 26, 27, 37. [Online] Available: https://www.theseus.fi/bitstream/handle/10024/156494/Muhammadou_Kanjo.pdf [Reviewed April 4, 2025]

5. Mbake, M. (2016*). Influence of social media on employee recruitment: Case of Cameroon.* Theseus.fi, p. 18 [Online] Available: https://www.theseus.fi/handle/10024/113528 [Reviewed April 4, 2025]

6. UNITAR. (2021). *Building a Better Cameroon: Tackling Illiteracy through Technology*. United Nations Institute for Training and Research. [Online] Available https://unitar.org/about/news-stories/stories/building-better-cameroon-tackling-illiteracy-through-technology [Reviewed April 4, 2025]

DIGITAL MARKETING IN TOURISM: OPPORTUNITIES FOR SRI LANKA

Uresha Ravinduni Dil De Punchihewa
Baltic International Academy, Riga, Latvia
Master in Enterprise Management in the Leisure and Entertainment Industry
uresharavinduni@gmail.com
Research Advisor:
Doc. Nadezhda Pazuhina, Dr. Art

ABSTRACT

This study conducts a systematic literature review to explore the role of digital marketing in promoting Sri Lanka's tourism industry. It examines the strategies, tools and challenges involved in leveraging digital platforms, social media, influencer marketing and user-generated content. The review aims to identify trends, opportunities and barriers in Sri Lanka's digital tourism efforts and offers recommendations for enhancing online engagement and improving marketing strategies to boost tourism growth.

Keywords: Digital Marketing, Influencer Marketing, Sri Lanka, Social Media, Tourism

ANOTĀCIJA

Šis pētījums veic sistemātisku literatūras pārskatu, lai izpētītu digitālās mārketinga lomu Šri Lankas tūrisma nozares veicināšanā. Tas pēta stratēģijas, rīkus un izaicinājumus, kas saistīti ar digitālo platformu, sociālo mediju, influenceru mārketinga un lietotāju radītas satura izmantošanu. Pārskats mērķē identificēt tendences, iespējas un šķēršļus Šri Lankas digitālajās tūrisma aktivitātēs, piedāvājot ieteikumus tiešsaistes iesaistes uzlabošanai un mārketinga stratēģiju pilnveidošanai, lai veicinātu tūrisma izaugsmi.

Atslēgvārdi: Digitālais mārketings, ietekmētāju mārketings, Šrilanka, sociālie mediji, tūrisms

INTRODUCTION

This study lies in the growing importance of digital marketing in the global tourism industry. As more travelers rely on online platforms to plan and book their trips destinations like Sri Lanka must adapt their marketing strategies to attract and engage potential tourists. With the rise of social media, influencer marketing and user-generated content understanding how these digital tools can be effectively utilized is crucial for the country's tourism sector. This research is timely given the increasing competition among global destinations and the need for Sri Lanka to recover and grow its tourism industry, particularly in the post-pandemic era. By examining the impact and challenges of digital marketing, the study aims to provide valuable insights for tourism stakeholders to enhance their digital presence and reach a broader international audience.

Research Problem

How can Sri Lanka's tourism sector effectively leverage digital marketing strategies to increase international tourist arrivals and revenue while overcoming infrastructure, inclusivity and technological challenges?

Goal of the research

To evaluate the effectiveness of digital marketing strategies in promoting Sri Lanka's tourism industry, identify the opportunities and challenges faced by tourism stakeholders in leveraging digital platforms, and provide recommendations for enhancing digital engagement to increase tourist arrivals and improve the country's global competitiveness.

Research Design

The research design for this study is qualitative and descriptive, focusing on systematically reviewing and synthesizing existing literature on digital marketing in the tourism sector, with a particular emphasis on Sri Lanka. The study will begin with a comprehensive search of academic databases, journals, books, and industry reports to gather relevant publications that explore the intersection of digital marketing and tourism. These sources will include both scholarly articles and practical reports to provide a broad perspective. The literature will then be analyzed through thematic analysis to identify key trends, challenges, and opportunities within the existing research. By categorizing and synthesizing findings, the study will highlight the impact of digital marketing strategies on Sri Lanka's tourism sector. A comparative approach will also be used to contrast findings from Sri Lanka with global trends, positioning the country within the broader digital tourism landscape and identifying areas for growth. Ultimately, this design aims to offer a structured, comprehensive overview of current knowledge, insights, and recommendations, while also pointing out areas for future research.

Research Method

The research method for this study is a systematic literature review. This method involves identifying, selecting, analyzing, and synthesizing existing scholarly and industry sources related to digital marketing in the tourism sector, with a specific focus on Sri Lanka. The study will involve searching academic databases, peer-reviewed journals, books, and industry reports to collect relevant publications. After gathering these sources, the research will categorize and analyze them thematically to extract key insights, trends, challenges, and opportunities. The findings will be synthesized to provide an in-depth understanding of how digital marketing influences Sri Lanka's tourism industry and to compare global trends with the local context. This method will ensure a comprehensive overview of existing knowledge while identifying gaps and potential areas for future research.

Digital Marketing in Global Tourism

The promotion of products, services, or brands via digital channels including websites, email, social media, and search engines is known as digital marketing, and it has drastically changed the travel industry worldwide.[13]Digital marketing is now a need for modern organizations, not simply an option, thanks to the growth of e-commerce and the widespread use of internet-enabled gadgets during the past three decades. Digital touchpoints are now an essential part of the customer experience in both business-to-business (B2B) and business-to-consumer (B2C) contexts, having a significant impact on decision-making and purchasing behavior.[12]

This digital transformation has been especially advantageous for the travel and tourism sector. Direct communication with prospective tourists, frequently across borders and time zones, is made possible by digital marketing for destination marketers, travel agents, and hospitality providers. Tourism stakeholders need to make investments in specialized technologies, strategic planning, and ongoing optimization if they want to prosper in this digital-first world.[4]To be competitive,

marketers must also have advanced skills like data analytics, social media management, content development, and search engine optimization.

The Role of Digital Marketing in Tourism Promotion

Digital marketing is a potent instrument for influencing traveler behavior and forming travel intentions in the worldwide tourism industry. Its ability to spread Tourist Destination Online Content (TDOC), such as reviews, photos, videos, and articles about a place, is one of its main advantages. Credibility, emotional reactions, and traveler trust are enhanced by high-quality, genuine, and reliable TDOC. Such digital material increases pleasure and promotes return business and word-of-mouth advertising when it faithfully captures real-life events.[1]

Destinations' perceptions are greatly influenced by Electronic Word of Mouth (eWOM), particularly when it comes to social media posts, online reviews, and shared travel images. To explore places and make travel decisions, today's travelers are depending more and more on digital platforms such as TripAdvisor, YouTube, Instagram, and Facebook. By interacting with previous guests, promoting content production, and providing rewards like discounts or freebies for sharing satisfying experiences, destination marketers may improve eWOM. This raises the destination's perceived worth in addition to increasing visibility.[7]

Key Digital Marketing Tools in Global Tourism

Digital marketing for tourism has evolved to encompass a range of tools and strategies that collectively enhance reach, engagement, and conversion.[11] These include:

- **Search Engine Marketing (SEM):** Involving both paid placements (pay-per-click advertising) and unpaid optimization (SEO), SEM helps travel businesses appear prominently in search engine results, increasing visibility among prospective tourists.

- **Online Public Relations (PR):** Focuses on managing the reputation of destinations through positive mentions on third-party platforms such as blogs, travel forums, and social media channels. It also involves managing and responding to negative feedback to protect brand image.

- **Online Partnerships:** These include collaborations with influencers, affiliate marketers, and travel aggregators to promote services on high-traffic third-party sites. Co-marketing campaigns and backlink strategies also fall under this category.

- **Display Advertising:** Uses visual content such as banners, rich media, and video ads to build brand awareness and direct traffic to specific travel-related websites or booking portals.

- **Opt-In Email Marketing:** Allows travel companies to communicate directly with consumers using permission-based email lists. This form of marketing is cost-effective and helps maintain long-term relationships through personalized content and promotions.

- **Social Media Marketing:** Involves the creation and sharing of content on platforms like Instagram, TikTok, Facebook, and Twitter to engage target audiences. Through organic posts, paid ads, and viral campaigns, social media marketing drives both awareness and action.

These tools are not only effective individually but also synergize when used as part of an integrated digital strategy, allowing travel marketers to maintain consistent messaging across multiple platforms and customer touchpoints.

Advantages of Digital Marketing Over Traditional Marketing

Digital marketing has several benefits for the travel and tourism sector when compared to conventional marketing techniques. The most important ones are targeted engagement, global reach, measurability, cost-effectiveness, and real-time communication. Print and television are two examples of traditional advertising methods that are frequently costly and provide little opportunity for engagement. Digital platforms, on the other hand, enable travel agencies to start international campaigns at a reduced cost, monitor user interaction in real time, and modify plans in response to performance indicators.[8]

Additionally, digital channels facilitate two-way communication, strengthening bonds between tourists and travel agencies. Customer happiness and loyalty are increased by personalized experiences, whether they are delivered via email marketing, social media engagement, or carefully chosen content. Additionally, digital tools offer insightful statistics that enable marketers to assess campaign efficacy, maximize return on investment, and make well-informed strategic choices.[17]

Digital technology's influence on the worldwide tourist business is constantly changing. The tourism industry is continuously undergoing a digital transition, from user-generated content and immersive virtual tours to AI-powered travel assistants and smartphone booking apps. Destinations throughout the world need to keep innovating, investing in digital infrastructure, and embracing the tools that allow them to connect with tourists from around the world more efficiently if they want to stay relevant and competitive.[17]

Tourism Industry in Sri Lanka

Statistics of Tourism in Sri Lanka

With substantial contributions to employment, foreign exchange profits, and regional growth, Sri Lanka's tourism sector is essential to the country's economy. The industry has had both significant failures and impressive progress over time.[2] The industry's dynamic nature and ability to withstand numerous setbacks are demonstrated in Figure 1,by the yearly number of visitors from 2005 to 2024.
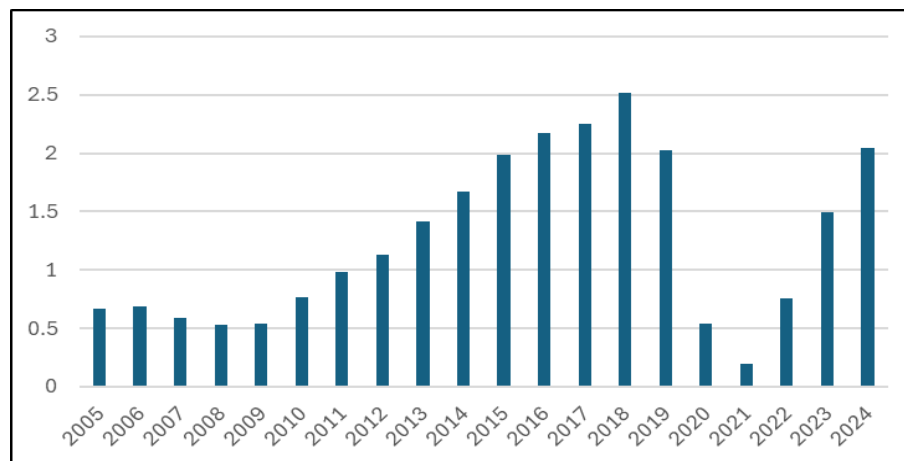

Figure 1. Annual tourist arrival to Sri Lanka (2005-2024) [15]

A protracted civil war afflicted Sri Lanka from 1989 to 2009. Furthermore, the nation had a catastrophic tsunami in 2004 that had a significant effect on coastal areas. The tourism sector started a steady rising trajectory after the civil war ended in 2009, reaching a peak of 2.5 million visitors in 2018. The Easter Sunday terrorist attacks, which targeted several popular tourist hotels and locations and resulted in a substantial death toll and a precipitous drop in visitor numbers, interrupted this increase in 2019.[6]

The global COVID-19 epidemic of 2020–2021 made matters worse by bringing international travel to a near complete halt. Sri Lanka experienced its greatest economic crisis since gaining independence in 1972, which further hampered its capacity to sustain infrastructure and services connected to tourism just as the sector was starting to rebound.[9] The industry has shown encouraging signs of resurgence despite these obstacles. Over 2 million foreign visitors visited the nation in 2024, a positive sign of its resiliency and resurgence in popularity.[14]

Sri Lanka's GDP continues to be significantly influenced by tourism. An estimated USD 3.2 billion was made by the industry in 2024. In 2023, there were 429,641 direct and indirect jobs in the sector, demonstrating the industry's significant contribution to job growth. In terms of the future, the Sri Lankan government has set a lofty target to draw 3 million visitors and earn USD 5 billion by 2025.[3]

A few major tourism statistics in 2024 are as follows.[15]

- **Tourist Arrivals (2024):** 2,053,465

- **Tourism Revenue:** USD 3.2 billion

- **Average Duration of Stay:** 8.42 nights

- **Average Tourist Expenditure per Day:** USD 181.15

Figure 2 highlights, monthly tourist arrivals to Sri Lanka.
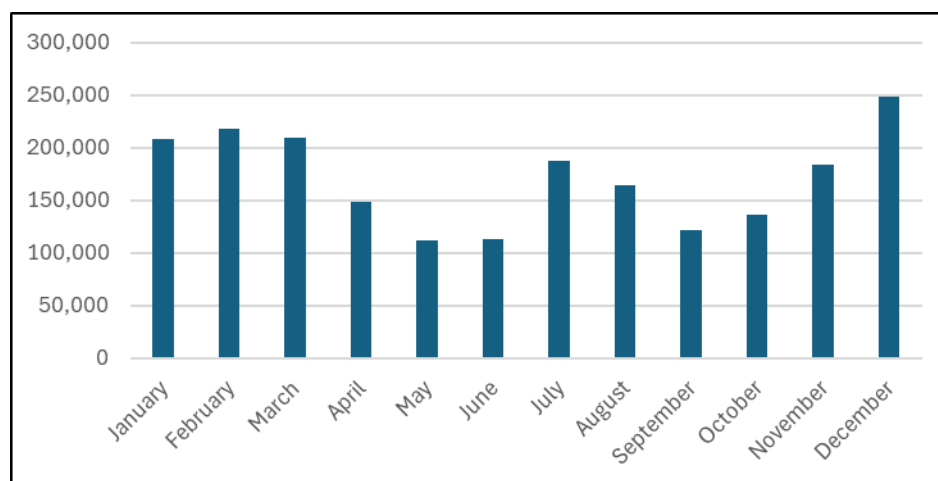
Figure 2. Monthly Tourist visits to Sri Lanka (2024)[15]

Due to the international holiday season, December had the highest number of arrivals. Travelers from Europe and North America sought warmer climates during other peak times, such as January to March and November. Due to local events and spring holidays, April saw a rise. Like this, July and August saw increases during international summer vacations and in conjunction with significant cultural occasions like the Kataragama Festival and the Esala Perahera in Kandy.[10]

With 50.67% of all arrivals in 2024, Europe continued to be Sri Lanka's top source market for tourists in terms of regional distribution (See Figure 3)[15] This domination demonstrates how popular the nation is among European tourists as a long-distance travel destination.
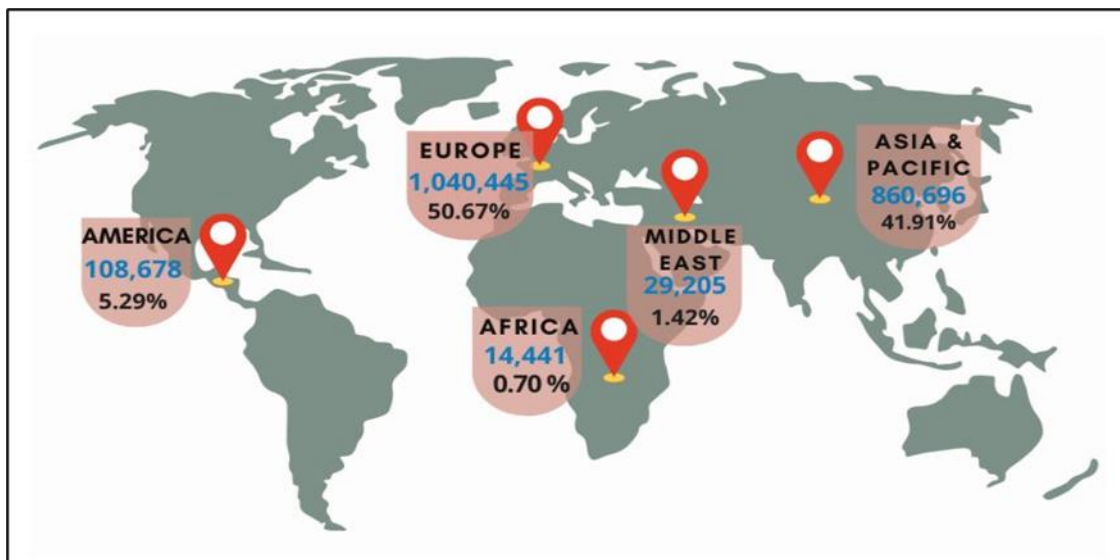
Figure 3. Tourist arrival to Sri Lanka by region in 2024[15]

With 41.91% of arrivals, the Asia-Pacific area came in second, highlighting the significance of proximity and regional connections. 5.29% of visitors came from the Americas, whilst 0.7% and 1.42% came from Africa and the Middle East, respectively(See Figure 3). These numbers point to the possibility of expanding underrepresented markets through focused marketing techniques.

There are many kinds of tourist attractions in Sri Lanka, including coastal, adventure, natural, and cultural attractions.

Tourist attractions in Sri Lanka

Anuradhapura, Sigiriya, Polonnaruwa, and Dambulla are examples of historical and cultural sites that emphasize the island's religious significance and ancient legacy. Spiritual and cultural landmarks are combined with contemporary entertainment in urban areas like Kandy and Colombo. While coastal regions like Bentota and Arugambay serve beachgoers and adventure tourists, natural features like Horton Plains, Knuckles Range, and Yala National Park attract ecotourists and nature lovers.[16]

Adventure-based locations like Ella and Kitulgala provide activities like hiking, surfing, and white-water rafting, frequently accompanied by breathtaking scenery. Sites like Galle and Trincomalee appeal to a variety of traveler groups because they combine historical charm with scenic beauty.[6]

The most popular destinations in 2024 were Sigiriya, which drew 508,653 tourists due to its historical and archeological value, and Yala National Park, which was visited by 353,646 foreigners and was well-known for its biodiversity and leopard population.).[15]

Mirissa, Minneriya, and Udawalawe were other well-known parks. Hurulu Eco Park was the most visited conservation forest, with 176,266 international tourists. The lack of tourism in many lesser-known national parks and heritage sites, on the other hand, suggests a need for more accessibility and wider promotion.).[15]

Sri Lanka Tourism Segmentation

Sri Lanka's tourist demographics in 2024 is revealed in Figure 4.[15]
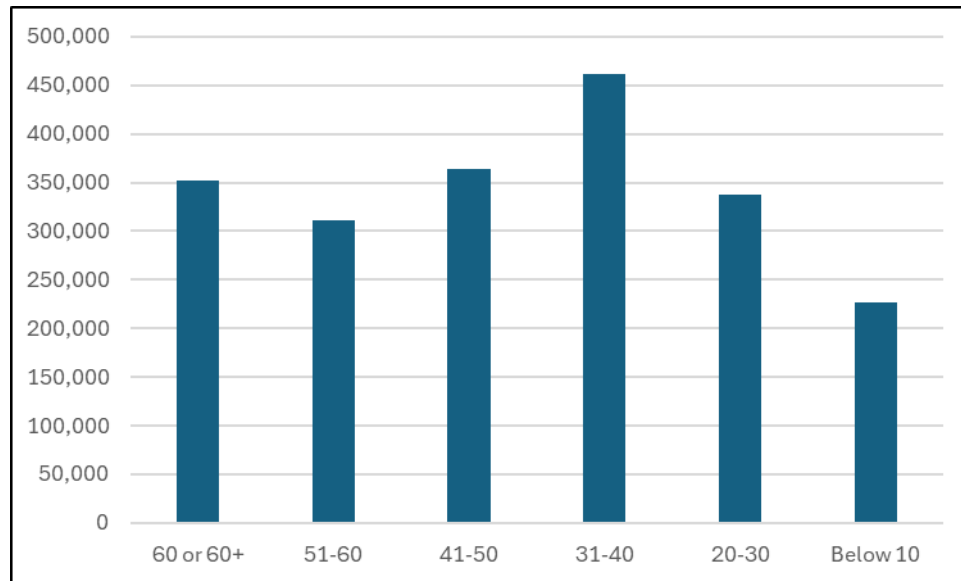
Figure 4. Sri Lanka's Tourism segmentation by age in 2024[15]

The greatest group of travelers (22.5%) were between the ages of 31 and 40, indicating that professionals in their prime constitute an important market. 17.2% of visitors were 60 years of age or older, probably attracted by Sri Lanka's scenic, cultural, and wellness attractions. Other noteworthy traveler demographics included middle-aged travelers (41–50 at 17.7%), seniors (51–60 at 15.2%), and younger tourists (16.4%) between the ages of 20 and 30, who might be drawn to low-cost lodging, social gatherings, and adventurous pursuits.

Although there were a variety of reasons why people visited, pleasure was the main one.
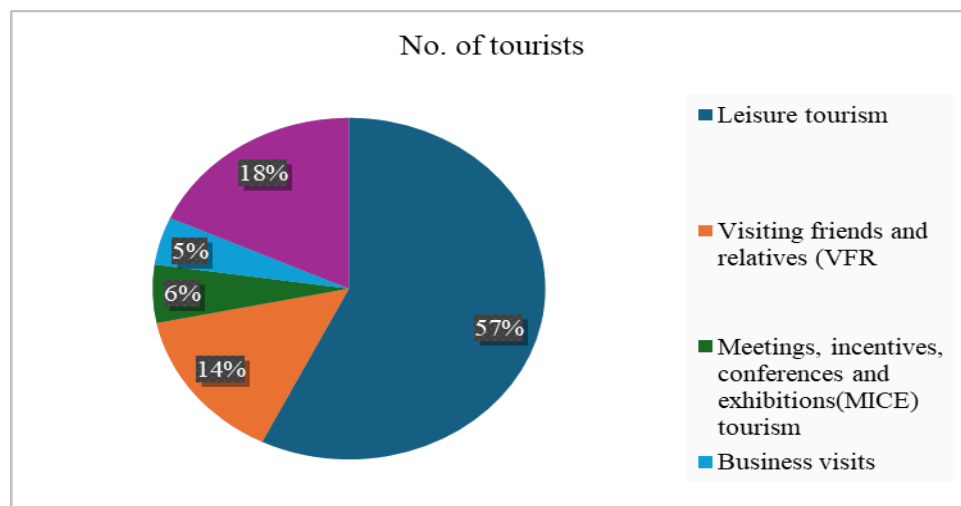
Figure 5. Sri Lanka's tourism segmentation by reason of visit in 2023[15]

In 2023, visiting friends and relatives (VFR) accounted for 215,395 visits, while leisure tourism accounted for 851,976 visits. With 81,796 visits, the MICE (Meetings, Incentives, Conferences, and Exhibitions) category demonstrated Sri Lanka's increasing popularity as a location for

corporate events. While "Others" (which includes health, education, and personal reasons) accounted for 270,808 visits, business-related travel accounted for 67,328 visits.[15]

Analysis of Digital Marketing in Sri Lanka's Tourism

Official website : www.srilanka.travel

To draw in foreign tourists, Sri Lanka's tourism sector has recently experienced a digital revolution, implementing a wide variety of online platforms and tactics. The Sri Lanka Tourism Promotion Bureau (SLTPB) and related institutions have adopted a thorough digital marketing strategy in response to the growing dependence of international tourists on digital platforms for trip planning and research. Using web platforms, social media, influencer marketing, and user-generated content, this strategy aims to highlight Sri Lanka's abundant natural beauty, rich cultural legacy, and exciting adventure opportunities.

The digital cornerstone of Sri Lanka's tourism marketing initiatives is the official website, www.srilanka.travel. With support for more than 15 languages, this website provides a visually appealing and intuitive user experience. Its user-friendly sections, such "Things to Do," "Where to Go," and "Plan Your Trip," make it simple for potential tourists to learn about Sri Lanka's attractions. High-quality photos and a simple layout enhance the website's visual appeal, which successfully highlights the nation's diverse landscapes and cultural experiences. Even though the website is mobile-friendly, some pages feel overly content-heavy and might use some speed optimization, especially for users with slow internet.

Calls to action, including booking tools or itinerary planning prompts, are not always readily apparent on websites with high content and search engine optimization (SEO), which helps the site rank on Google's first page for relevant searches like "Sri Lanka travel." Adding additional interactive elements, such as virtual tours, live chat, or user reviews, may increase conversion rates and user engagement. Although there is potential for improvement in terms of interactivity and real-time customization, the website functions effectively as a consolidated portal overall.

YouTube Channel: www.youtube.com/@srilankatourism_SLTPB

Another essential component of Sri Lanka's digital tourism strategy is social media. Regular updates regarding travel safety, events, beautiful locations, and marketing initiatives are shared on the official Tourism Sri Lanka Facebook page, @TourismSriLanka. It maintains visual and thematic coherence through the regular use of vibrant photography, video content, and brand-aligned hashtags like #SoSriLanka. Although the page is active and receives a respectable amount of likes and comments, polls, quizzes, and live video sessions might be used to boost activity.

Professionally produced videos that highlight Sri Lanka's culture and beauty are shown on YouTube under the @srilankatourism_SLTPB channel. Viewers can surf the channel according to their preferences with the help of themed playlists on festivals, wildlife, and wellness. The irregular upload frequency may have an impact on interaction and exposure on YouTube's algorithm, despite the high caliber of the content. More participatory video formats, such vlogs or interviews, improved metadata, and multilingual subtitles could all aid in drawing in and keeping a larger worldwide audience.

Social media pages

The @destination_srilanka Instagram handle is excellent at telling stories through images. With its vivid, carefully chosen material, this site draws viewers in by showcasing the nation's aesthetic appeal through breathtaking photos and short movies. Frequent updates give prospective tourists a comprehensive overview of Sri Lanka's attractions, ranging from wildlife and cuisine to historic temples and scenic coastlines. The page is active, but adding interactive Stories, Instagram Reels, and user-focused elements like Q&A sessions or behind-the-scenes photos from nearby events might increase engagement.

With the account @tourismlk, Twitter (now X) serves more as a formal communication platform. It disseminates industry news, policy pronouncements, and timely updates. Twitter is useful for real-time communication with media outlets and industry stakeholders, despite not having as much visual appeal as other networks. Nevertheless, the account has mediocre engagement rates and a limited posting frequency. Posting travel-related information, polls, event countdowns, and real-time updates could boost exposure and engagement with followers.

Influencer marketing and User-generated content in promoting Sri Lanka Tourism

A key component of Sri Lanka's contemporary tourism promotion strategy is influencer marketing. Through partnerships with prominent content producers from important target countries like the UK, India, Hong Kong, and Australia, the SLTPB successfully uses influencers' reputation and personal stories to market travel. Viral material created by campaigns featuring celebrities like Nas Daily has reframed Sri Lanka as a hospitable and resilient travel destination all year round. Influencers like Chloe Gunning and Vaishali Sha increase the allure of the destination by catering to a variety of audience segments, from adventure and spiritual travel to family vacations.

Sri Lanka wants to emulate the high return on investment and media exposure that influencer-driven tourism campaigns in destinations like Benidorm, Spain, have demonstrated. These efforts are strengthened through partnerships with hotel chains such as Jetwing and Cinnamon Life, which guarantee that the influencer content is based on real-life experiences. However, authenticity is essential to influencer marketing's success. Commercial-looking advertisements are not as effective with travelers as narrative-driven, human experiences. By choosing influencers who discuss the positives and negatives of their travel experiences, SLTPB fosters trust and piques the attention of prospective tourists.

This strategy is further strengthened by user-generated content (UGC), which transforms regular travelers into brand advocates. Sri Lanka is kept up to date in international travel discussions by encouraging tourists to post their images, films, and experiences on websites like Instagram, YouTube, TikTok, and even Chinese channels like Xiaohongshu. UGC broadens the campaign's reach beyond official posts and helps personalize the destination by providing a variety of viewpoints, from luxury seekers to backpackers.

It's still difficult to gauge how influencer campaigns and user-generated content affect real visitor arrivals or reservations, even though they provide significant visibility and interaction. Sri Lanka must upgrade its digital infrastructure, such as online reservation platforms and real-time transportation updates, to close this gap. The nation can guarantee that internet interest results in positive and repeatable travel experiences by attending to these pragmatic needs.

Opportunities for Sri Lanka

The tourist sector in Sri Lanka has a lot of potential to grow internationally, draw in a variety of visitor demographics, and bounce back from geopolitical and economic failures thanks to digital marketing. Targeting specialized audiences with data-driven campaigns is one of the most intriguing options. Tourism stakeholders may create customized ads targeting adventurers, wellness travelers, cultural tourists, and eco-conscious tourists using tools like Google Ads, Facebook Business Suite, and influencer analytics.

The increasing impact of social media and mobile platforms on trip planning presents another significant possibility. With more people across the world using smartphones, particularly millennial and Gen Z tourists, Sri Lanka can use mobile-first tactics to interact with audiences on YouTube, Instagram, and TikTok. These channels are perfect for user interaction, visual promotion, and storytelling, which complement the nation's beautiful scenery and vibrant culture.

Furthermore, utilizing cutting-edge technology like augmented reality (AR), virtual reality (VR), and 360-degree media provides a novel way to engage with digital content. Before making a reservation, potential travelers may be able to "preview" their vacation through virtual tours of national parks, temples, or beach resorts, strengthening their emotional bonds. AI chatbot integration for real-time multilingual help and traveler support on websites may improve user pleasure and service quality even further.

Another benefit of Sri Lanka is its powerful brand identity, "So Sri Lanka," which can be continuously reaffirmed across digital channels. Increased global competitiveness and brand memory can result from a cohesive digital marketing strategy centered on themes of authenticity, resiliency, and different experiences.

Challenges for Sri Lanka

Notwithstanding these advantages, several obstacles stand in the way of the widespread adoption of successful digital marketing in Sri Lanka's travel and tourism industry. One significant problem is that small and medium-sized tourism businesses (SMTEs) lack strategic knowledge and digital literacy. While government agencies and large hotel chains have embraced contemporary technologies, many local operators find it difficult to stay online or know how to use social media, SEO, or online booking systems efficiently.

Another major limitation is the small amount of money allotted for ongoing digital campaigns. The tourism industry lacks steady funding for the creation of long-term digital strategies, despite the existence of influencer partnerships and short-term promotional initiatives. Missed engagement chances during off-peak seasons, disjointed initiatives, and uneven branding result from this.

Another urgent issue is the discrepancy between infrastructure readiness and digital visibility. Travelers find it challenging to finish their online booking process from inspiration to antiquated digital payment systems, low adoption of e-commerce tools, and poor internet connectivity in some remote places. Digital initiatives may be undermined by missed revenue or unfavorable travel experiences because of this mismatch.

The tourism sector underutilizes data analytics, which is essential for comprehending passenger behavior and improving campaigns. Campaign effectiveness measurement, conversion tracking, and follow-up marketing using CRM (Customer Relationship Management) systems are all limited. Digital initiatives are reactive rather than proactive in the absence of relevant data insights.

Apart from operational difficulties, Sri Lanka encounters systemic and structural impediments to expanding digital marketing in the travel industry. Localization of content and linguistic variety are still problems. Although there are multilingual alternatives on the main tourism website, a large portion of the information on other platforms is English-centric, which restricts reach in source markets like China, Japan, and Russia where English is not the primary language.

Concerns about cybersecurity and data privacy are becoming more significant obstacles, especially as travel platforms gather private user information. There may be breaches or a decline in customer trust because of many tourism organizations' inadequate digital security procedures and ignorance of data protection laws.

The success of digital marketing initiatives can also be hampered by political unpredictability, economic uncertainty, and unfavorable worldwide media coverage. If tourists are worried about financial instability, safety, or the dependability of their transportation, even the most captivating advertising may have trouble turning interest into reservations. Through transparency and real-time reassurance, digital marketing may assist refute these narratives, but only if it is in line with real-world advancements.

Lastly, there is a discernible difference in digital inclusion between urban and rural areas. Major cities or well-known locations like Colombo, Galle, or Sigiriya are the focus of most digital infrastructure and advertising geared toward the tourism industry. Emerging regions with unrealized tourism potential frequently lose out on growth prospects because they lack the digital resources and exposure necessary to take part in international marketing campaigns.

CONCLUSION

In conclusion, digital marketing has indelibly transformed the global tourism landscape, offering unprecedented opportunities for destinations like Sri Lanka to engage with potential travelers worldwide. The effective use of online platforms, from official websites and social media to influencer collaborations and user-generated content, has become crucial for promoting attractions, shaping perceptions, and driving visitation. Sri Lanka has made notable strides in adopting digital tools, leveraging its natural beauty and cultural richness through visually appealing content and strategic online presence.

However, the analysis reveals both significant opportunities and considerable challenges for Sri Lanka's tourism sector in fully harnessing the power of digital marketing. The potential for targeted campaigns, mobile-first engagement, and the use of immersive technologies like AR and VR offer exciting avenues for growth and differentiation. The strong "So Sri Lanka" brand provides a solid foundation for cohesive digital narratives that emphasize the nation's unique appeal and resilience.

Despite these prospects, several key obstacles must be addressed to ensure the sustained success of digital marketing efforts. These include the need to enhance digital literacy and strategic expertise among small and medium-sized tourism enterprises, secure consistent funding for long-term digital campaigns, and bridge the gap between digital visibility and on-the-ground infrastructure readiness. Furthermore, the underutilization of data analytics, the limitations of English-centric content, growing concerns about cybersecurity, and the impact of external factors like political and economic instability all present significant hurdles. Addressing the digital divide between urban and rural areas is also crucial for ensuring that the benefits of digital tourism promotion are widespread.

Moving forward, Sri Lanka's tourism stakeholders must prioritize strategic investments in digital infrastructure, skills development, and data-driven marketing approaches. By fostering greater digital inclusion, localizing content for diverse markets, and building trust through robust online security measures, Sri Lanka can more effectively convert online interest into tangible tourism growth. Embracing innovation and adapting to the ever-evolving digital landscape will be essential for Sri Lanka to maintain its competitiveness and achieve its ambitious tourism goals in the years to come.

REFERENCES

1. Armutcu, Barış, Ahmet Tan, Mary Amponsah, Subhadarsini Parida, and Haywantee Ramkissoon. 2023. "Tourist Behaviour: The Role of Digital Marketing and Social Media." *Acta Psychologica* 240 (October): 104025. https://doi.org/10.1016/j.actpsy.2023.104025.

2. Bhakat, Ayan, Nirmalya Das, and Santu Guchhait. "Temporal Change of Foreign Tourism in Sri Lanka: A Study on Economic Perspective." *Journal of Environmental Management & Tourism* 14, no. 6 (2023): 2786-2798.

3. Central Bank of Sri Lanka. Accessed [April 15 2025]. https://www.statistics.gov.lk/.

4. Chaffey, Dave, and Paul R. Smith. *Digital Marketing Excellence: Planning, Optimizing and Integrating Online Marketing*. 6th ed. Routledge, 2022. https://doi.org/10.4324/9781003009498.

5. Fernando, Shameena, and Neil Carr. 2024. "A History of Tourism in Sri Lanka: A Story of Disasters and Opportunities." *Tourism Cases*, tourism.2024.0060. CABI. https://doi.org/10.1079/tourism.2024.0060.

6. Fernando, Sriyantha, Jayatilleke S. Bandara, and Christine Smith. "Tourism in Sri Lanka." In *The Routledge handbook of tourism in Asia*, pp. 271-284. Routledge, 2016.

7. Goyal, C., and U. Taneja. 2023. "Electronic Word of Mouth for the Choice of Wellness Tourism Destination Image and the Moderating Role of COVID-19 Pandemic." *Journal of Tourism Futures*, ahead-of-print, no. ahead-of-print. https://doi.org/10.1108/JTF-08-2022-0207.

8. Jan, A., M. Khan, M. M. Ajmal, and A. K. Patwary. 2023. "From Traditional Advertising to Digital Marketing: Exploring Electronic Word of Mouth through a Theoretical Lens in the Hospitality and Tourism Industry." *Global Knowledge, Memory and Communication*, ahead-of-print, no. ahead-of-print. https://doi.org/10.1108/GKMC-08-2022-0199.

9. Karunarathne, A. C. I. D., J. P. R. C. Ranasinghe, U. G. O. Sammani, and K. J. T. Perera. "Impact of the COVID-19 pandemic on tourism operations and resilience: stakeholders' perspective in Sri Lanka." *Worldwide Hospitality and Tourism Themes* 13, no. 3 (2021): 369-382.

10. Konarasinghe, K.M.U.B, Time Series Patterns of Tourist Arrivals to Sri Lanka (January 18, 2016). Review of Integrative Business and Economics Research, Vol 5(3), pp 161-172, Available at SSRN: https://ssrn.com/abstract=2860733

11. Paendong, Melky K. E., Precylia R. Rambing, Christopel H. Simanjuntak, Arief P. Kumaat, Mikke R. Marentek, and Nancy H. J. Mandey. 2023. "Digital Marketing Ecosystem Perspective of Regional Featured Product in North Sulawesi Province, Indonesia." *Open Journal of Social Sciences* 11, no. 2 (February 7): 28–41.

12. Rachmad, Yoesoep Edhie. 2024. *Digital Marketing Theories: From Gimmicks to Loyalty*. PT. Sonpedia Publishing Indonesia.

13. Sadullayevna, Djurayeva Munira. 2024. "BASICS OF DIGITAL MARKETING." *Gospodarka i Innowacje* 51: 160-66.

14. Samarathunga, W. H. M. S., and Dimuth Gamage. "Alternative tourism as an alternate to mass tourism during the Post-COVID-19 recovery phase: The case of Sri Lanka." *Authorea Preprints* (2024).

15. Sri Lanka Tourism Development Authority, "Sri Lanka Tourism Development Authority," accessed [April 14, 2025], https://www.sltda.gov.lk/en.

16. Wijewardena Gamalath, K. A. I. L. "Beautiful, natural places and tourist attractions in Sri Lanka." *The Institute of Biopaleogeography named under Charles R. Darwin* 3 (2021): 1-44.

17. Yakup Durmaz, and Ibrahim Halil Efendioglu. 2016. "Travel from Traditional Marketing to Digital Marketing". *Global Journal of Management and Business Research* 16 (E2):35-40. https://doi.org/10.34257/GJMBREVOL22IS2PG35

TOURISM DIVERSIFICATION IN THE SOUTHERN PROVINCE OF SRI LANKA - TRENDS AND OPPORTUNITIES

Thamara Siriwardena,
Baltic International Academy
European Economics and Business
Malisiriwardena92@gmail.com

ANOTĀCIJA

Šrilankas Dienvidu province, kas ir pazīstama ar savām pludmalēm, faunu un floru, kā arī kultūras bagātību, vienmēr ir balstījusies uz visai šauru tūrisma produktu klāstu. Šajā kopsavilkumā kā konteksts tiek izmantotas mūsdienu tūristu plūsmas un izdevumu tendences Provincē, lai argumentētu, kurā virzienā produkta paplašināšana nākotnē varētu nodrošināt lielāku noturību, piesaistīt daudzveidīgākus tūristus, kā arī veicināt ekonomiski ilgtspējīgu un taisnīgāku izaugsmi.

Pētījumā tiks analizēts potenciāls izmantot Dienvidu provinces bagātīgos resursus, tostarp tās kultūras mantojuma objektus, Jalas un Bundalas nacionālos parkus, unikālo kultūras mantojumu un iespējas attīstīt piedzīvojumu un ekotūrismu. Tiks ņemtas vērā arī jaunākās globālās tūrisma tendences, tostarp pieredzes balstīti ceļojumi, labsajūtas atpūtas un kopienu iniciētas tūrisma aktivitātes.

Visbeidzot, kopsavilkumā īsi tiks aplūkoti priekšnoteikumi un izaicinājumi veiksmīgai tūrisma dažādošanai Dienvidu provincē. Tie var ietvert nepieciešamību attīstīt infrastruktūru, veicināt vietējo iedzīvotāju kapacitāti, īstenot efektīvus mārketinga pasākumus, kā arī nepieciešamību nodrošināt ilgtspējīgas darbības, lai aizsargātu dabas un kultūras mantojumu. Izzinot galvenās tendences un atklājot vēl neizmantotās iespējas, šis pētījums varētu sniegt vērtīgu ieguldījumu ieinteresētajām pusēm, kuras vēlas stiprināt un padarīt ilgtspējīgāku tūrisma nozari Šrilankas Dienvidu provincē.

Atslēgvārdi: Kultūras mantojums, Dažādošana, Ekotūrisms, Ilgtspēja

ABSTRACT

Sri Lanka's Southern Province, home to its beach lands, fauna and flora, and cultural richness, has always been reliant upon quite a narrow range of tourist products. Here an abstract takes as its context contemporary tourist flow and expenditure trends within the Province in order to argue where future enlargement of the product might offer sources of enhanced resilience, increased levels of variability amongst tourists to be attracted to it, as well as economically sustainable and distributivity superior expansion.

The study will investigate the potential for developing the use of the Southern Province's abundant resources, including its heritage attractions, national parks of Yala and Bundala, unique cultural heritage, and opportunities for adventure and eco-tourism. The study will consider also emerging global trends in tourism, which involve experiential breaks, well-being getaways, and community-based tourism initiatives.

Finally, the abstract will touch on briefly the enabling conditions and challenges of successful tourism diversification within the Southern Province. These may include infrastructure development requirements, capacity building among locals, effective marketing efforts, and the need for sustainable measures to protect the natural and cultural heritage of the area. Through the identification of key trends and the revelation of untapped opportunities, this research hopes to be beneficial to stakeholders who would like to contribute to a stronger and more sustainable tourism sector in Sri Lanka's Southern Province.

Keywords: Cultural heritage, Diversification, Eco-tourism, Sustainability

INTRODUCTION

The Southern Province of Sri Lanka, blessed with a stunning coastline fringed by golden shores, world-famous biodiversity hotspots like Yala and Bundala National Parks, and an abundance of cultural and historical heritage, has long been a backbone of the nation's tourism. Although its classic attractions have been successful in attracting tourists, a growing worldwide consciousness of the limitations of concentrated tourism models, combined with changing traveler tastes, requires a strategic move towards diversification [4]. This piece addresses the absolute need for the diversification of tourism in the Southern and analyzes the dominant trends characterizing the global tourism landscape and capturing the intrinsic opportunities present for utilizing in strengthening the regional tourism sector to be more resilient, sustainable, and economically diversified Province and analyzes the dominant trends characterizing the global tourism landscape and capturing the intrinsic opportunities present for utilizing in strengthening the regional tourism sector to be more resilient, sustainable, and economically diversified.

Tourism attraction to the Southern Province has long been largely overdependent on the pristine beaches and wildlife encounters in the past. However, such reliance has exposures to seasonality, external shocks, and probable environmental stresses. In cognizance of these limitations, this study presumes that diversifying the tourist product ahead of time is essential to the long-term health of the area. This calls for an in-depth knowledge of new global tourism trends, including the increasing demand for authentic experiences, green travel, wellness tourism, adventure activities, and the rising interest in local culture and heritage.

This conference article will explore the particular assets of the Southern Province that have potential for diversification. Apart from its firmly established tourist attractions, the area also boasts a goldmine of less-documented historical ruins, vibrant local traditions, potential for community-based tourism ventures [5], and diverse natural landscapes conducive to a wide range of adventure and eco-tourism pursuits. Through examination of these as-yet untapped resources within the context of current global tourism demands, this paper aims to provide insight into opportunities for developing a richer and more diverse tourism product for the Southern Province of Sri Lanka. Lastly, this analysis hopes to provide useful recommendations for policymakers[7], tourism operators, local communities, and other stakeholders who are interested in the sustainable and prosperous future of tourism in the key region.

BASIC THEORETICAL AND PRACTICAL PROVISION

Tourism diversification is essential for achieving sustainable and inclusive development, particularly in regions rich with natural, cultural, and community assets. The Southern Province of Sri Lanka offers a unique opportunity to apply theoretical concepts of sustainable tourism through targeted practical initiatives. This paper explores the theoretical underpinnings that guide tourism diversification and aligns them with specific tourism product types developed across global, regional, national, and provincial levels [1].

Theoretical Provisionings and Their Strategic Linkages

1. Theoretical Link: Promotes sustainable growth of tourism by ensuring that infrastructure is made environment-friendly and enhances the visitor experience.Tourism diversification must begin with infrastructure that supports eco-friendly practices and enhances visitor

experience. Environmentally sustainable facilities, renewable energy usage, and waste management are all foundational [4].

- Capacity Building and Skill Development
  Diversification requires professionally qualified human capital with skills to deliver high-quality and diversified tourist experiences. Local community training programs in areas like eco-tourism guiding, hospitality management, and niche tourism-specific activities are essential.

2. Theoretical Link: Adheres to socio-cultural equity by enabling local communities through employment and development of skills.Empowering local communities through education and skill enhancement ensures long-term participation and equity in tourism benefits[4].

- Community Involvement and Participation
  Involvement of the local community in planning and developing tourism is critical to guarantee long-term sustainability and social acceptability of diversification efforts[2].

3. Theoretical Linkage: Strongly supports socio-cultural equity and sustainable tourism development by facilitating local ownership and benefit sharing.Active community participation ensures that tourism planning is inclusive and that   have a vested interest in preservation and service quality [1].

- Policy and Regulatory Environment
  Favorable policy and regulatory environments are required to promote and guide tourism diversification.

4. Theoretical Connection: Creates a conducive environment for innovation and sustainable development in the tourism sector.Enabling regulations, streamlined processes, and sustainability incentives catalyze diversified tourism investments[4][2].

- Marketing and Promotion Strategies
  Effective marketing and promotion are essential to creating visibility for diversified tourism products.

5. Theoretical Link: Directly supports market segmentation and niche marketing by communicating with precise target groups with precise information.Strategic marketing enhances visibility of specialized tourism offerings and attracts target audiences to niche experiences.

Practical Provisionings and Their Application

In alignment with the theoretical frameworks, the following tourism product types illustrate how these concepts are being implemented across the global, regional (Asia), national (Sri Lanka), and provincial (Southern Province) levels:

Eco-Tourism is a rapidly expanding segment globally, focusing on responsible travel to natural areas with an emphasis on conservation and community benefit. Destinations like Costa

Rica, the Amazon, and Kenya are world leaders, offering eco-lodges, safaris, and rainforest experiences. In Asia, eco-tourism thrives in Borneo, Indian national parks, and Thailand's reserves, where trekking, wildlife watching, and community-run lodges are popular. Sri Lanka stands out for its biodiversity, with Sinharaja and Kanneliya rainforests, Yala and Bundala national parks, and marine environments drawing eco-conscious travelers. The Southern Province is particularly strong in this area, with Sinharaja (a UNESCO site), Kanneliya, Bundala, and the Madu Ganga wetlands offering guided treks, birdwatching, mangrove tours, and opportunities for community-based eco-lodges.

Agro-Tourism has grown in appeal as travelers seek authentic rural experiences and closer connections to food production. Globally, this includes vineyard tours in Europe and the US, rice planting in Bali, and olive harvesting in Greece. In Asia, rice terraces in Bali and the Philippines, tea plantations in India and Sri Lanka, and fruit farms in Malaysia and Thailand offer immersive agricultural tourism. Sri Lanka's agro-tourism is developing, with tea plantation tours in the hill country, cinnamon estate visits in the south, spice gardens, and farm stays providing hands-on experiences. The Southern Province is a leader in this niche, famous for its cinnamon and tea plantations around Galle and Matara, where visitors can participate in plantation tours, cinnamon processing, and farm-to-table dining.

Cultural Tourism: is a cornerstone of the global tourism industry, attracting visitors to museums, heritage cities, festivals, and local traditions. Iconic sites like the Louvre, Angkor Wat, and Rio Carnival showcase the diversity of cultural tourism worldwide. In Asia, cultural tourism is vibrant, with ancient temples, heritage cities, and traditional arts drawing millions to places like Kyoto, Angkor, and Varanasi. Sri Lanka's rich cultural heritage is reflected in UNESCO sites such as Sigiriya, Galle Fort, and the Temple of the Tooth, as well as ancient cities and colorful festivals. In the Southern Province, Galle Fort (UNESCO), Kataragama Temple, Mulkirigala Rock Temple, and colonial heritage sites offer heritage walks, local festivals, and artisan workshops like mask making in Ambalangoda, with potential for even more immersive experiences.

Wellness Tourism has become a global phenomenon, with spa resorts, yoga retreats, and holistic health centers attracting travelers seeking relaxation and well-being. Europe, Asia, and the Americas are key markets, and post-pandemic, demand for wellness travel has surged. Asia leads with Ayurveda in India and Sri Lanka, Thai massage, Japanese onsens, and luxury spa resorts. Sri Lanka is renowned for its Ayurveda resorts, yoga and meditation centers, and spa tourism, appealing to health-conscious travelers. The Southern Province is expanding its wellness offerings, with Ayurveda resorts and yoga retreats along the coast (Bentota, Galle, Tangalle), and strong potential to integrate wellness with nature and culture.

Beach and Marine Tourism is one of the most popular forms of tourism worldwide, with destinations like the Caribbean, Mediterranean, and Pacific Islands offering sun, sea, and water sports. In Asia, the Maldives, Thailand, Indonesia, and Sri Lanka are top beach destinations, known for diving, surfing, and snorkeling. Sri Lanka's southern coast is world-famous for beaches like Unawatuna, Mirissa, Hikkaduwa, and Tangalle, offering surfing, diving, whale and dolphin watching, and turtle conservation. The Southern Province is the heart of Sri Lanka's beach tourism, with these beaches and marine activities being the region's most developed and high-potential tourism products.

Adventure Tourism is booming globally, appealing to younger and active travelers with activities like trekking, rafting, skiing, surfing, and safaris. The Alps, Machu Picchu, and the Great Barrier Reef are iconic adventure destinations. In Asia, the Himalayas, Krabi's climbing sites, and surfing in Bali and Sri Lanka are major draws. Sri Lanka is developing adventure tourism with hiking, rafting, surfing, and wildlife safaris. The Southern Province offers surfing (Weligama, Hikkaduwa), diving, hiking, cycling, and river safaris, and with further promotion and infrastructure, it can become a regional adventure hub.

Heritage Tourism focuses on historical sites and monuments, such as the Pyramids of Giza, the Colosseum, and Stonehenge. In Asia, heritage tourism includes the Great Wall of China, Angkor Wat, Korean palaces, and colonial architecture in Penang and Macau. Sri Lanka's heritage tourism features Galle Fort, ancient cities, colonial buildings, and museums, with opportunities for restoration and digital interpretation. The Southern Province is especially rich in heritage, with Galle Fort, colonial churches, temples, and heritage walks, and there is strong potential for digital storytelling and interactive heritage trails.

Community-Based Tourism is managed and owned by local communities, providing authentic, immersive experiences and ensuring that tourism benefits are shared locally. Globally, this includes homestays in Africa, Latin America, and Asia. In Asia, village homestays in Vietnam and Laos, indigenous tourism in Malaysia and Thailand, and participatory rural experiences are popular. Sri Lanka's community-based tourism is emerging, with village homestays, craft workshops, and participatory tourism in rural areas. The Southern Province is developing village homestays, craft workshops (mask making, lace), rural cooking, and community-run guesthouses, empowering local people and spreading tourism benefits.

Medical Tourism involves travel for medical treatments, with Thailand, India, Singapore, Turkey, and Hungary as global leaders. Asia is a hub for cosmetic, dental, and wellness tourism, with advanced hospitals and integrated wellness packages. Sri Lanka's medical tourism is focused mainly on Ayurveda and wellness, with limited infrastructure for international medical patients. The Southern Province offers Ayurveda and wellness tourism, with few dedicated medical tourism facilities, but there is potential for growth in holistic health and wellness packages [3].

Sports and Event Tourism is a major driver worldwide, with events like the Olympics, World Cups, marathons, and festivals attracting millions. In Asia, F1 (Singapore), cricket (India, Sri Lanka), marathons (Tokyo, Bangkok), e-sports, and traditional festivals are popular. Sri Lanka hosts cricket matches, marathons, surfing competitions, and cultural festivals, with potential for more international events. The Southern Province is home to Galle cricket matches, surfing competitions, the Galle Literary Festival, temple festivals, and food/craft markets, and there is room to attract more events and festivals.

Urban/City Tourism is thriving globally, with city breaks, shopping, nightlife, and culinary experiences in cities like New York, Paris, Tokyo, and London. In Asia, urban tourism is booming, with smart cities (Singapore, Seoul), food/shopping (Bangkok, Tokyo), and creative districts. Sri Lanka's Colombo and Galle are emerging as urban tourism hubs, offering city tours, shopping, dining, and creative spaces. In the Southern Province, Galle city tours, boutique shopping, cafes, and creative spaces are developing, with potential for culinary and urban cultural tourism.

In Summery, Each tourism product type has a unique development trajectory and potential at the global, Asian, Sri Lankan, and Southern Province levels [5][3]. The Southern Province, in particular, excels in beach/marine, eco, heritage, wellness, and agro-tourism, and shows high potential for adventure, community-based, and experiential products. This diversity supports sustainable regional development and aligns with both regional strengths and global tourism trends.

RESEARCH RESULTS AND THEIR EVALUATION

Comparative Market Analysis with Numerical Values[7]
Key Insights (with Quantitative Reinforcement)

Table 1

Tourism Product Type	Worldwide Market Size / Growth (%)	Asian Region Market Size / Growth (%)	Sri Lanka Market Size / Growth (%)	Southern Province Share / Potential (%)
Eco-Tourism	$181B (2023), CAGR 14.2%1	$60B+, CAGR 13%	$600M+, CAGR 10%	~35% of SL eco-tourism, High potential
Cultural Tourism	$1.2T (2023), CAGR 12%	$400B+, CAGR 11%	$1.1B+, CAGR 8%	~30% of SL cultural tourism
Agro-Tourism	$60B (2023), CAGR 11%	$18B+, CAGR 10%	$50M+, CAGR 12%	~40% of SL agro-tourism, Growing
Wellness Tourism	$814B (2022), CAGR 9.9%	$240B+, CAGR 12%	$350M+, CAGR 10%	~25% of SL wellness tourism, Expanding
Beach/Marine	$400B+ (2023), CAGR 8%	$120B+, CAGR 9%	$1.5B+, CAGR 8%	~45% of SL beach tourism, Very strong
Adventure Tourism	$366B (2022), CAGR 15.2%	$100B+, CAGR 13%	$120M+, CAGR 10%	~30% of SL adventure, High potential
Community-Based	$50B+ (2023), CAGR 10%	$15B+, CAGR 11%	$35M+, CAGR 11%	~40% of SL community-based, Emerging
Heritage Tourism	$700B+ (2023), CAGR 10%	$220B+, CAGR 9%	$900M+, CAGR 7%	~35% of SL heritage, Strong
Medical Tourism	$100B+ (2023), CAGR 12%	$60B+, CAGR 13%	$30M+, CAGR 9%	<5% of SL medical, Limited

Sports/Event	$800B+ (2023), CAGR 10%	$200B+, CAGR 11%	$80M+, CAGR 8%	~20% of SL sports/event, Growing
Urban/City	$1.5T+ (2023), CAGR 8%	$500B+, CAGR 9%	$400M+, CAGR 7%	~10% of SL urban, Emerging

Notes:
- Market sizes are approximate, based on latest industry reports and tourism boards.
- Sri Lanka's total annual tourism revenue (pre-pandemic) was around $4.4B (2018-2019).
- Southern Province is estimated to contribute 30-45% of Sri Lanka's tourism activity, especially in beach, eco, and heritage segments.[*Table 1*]

Key Insights
1. Eco-Tourism and Adventure Tourism are among the fastest-growing segments globally and regionally, with Southern Province well-positioned due to its rainforests, parks, and coastline.
2. Beach/Marine Tourism remains the strongest product for Southern Province, capturing nearly half of Sri Lanka's market in this segment.
3. Cultural and Heritage Tourism is robust worldwide and in Asia; Southern Province's Galle Fort and temples are key assets.
4. Agro-Tourism and Community-Based Tourism are smaller but growing rapidly, offering high potential for rural and authentic experiences.
5. Wellness Tourism is booming in Asia, with Southern Province's Ayurveda and yoga retreats gaining popularity.
6. Medical and Urban Tourism remain limited in Southern Province but have room for niche development.
7. Sports/Event Tourism is growing, especially with events like the Galle Literary Festival and surfing competitions.

Comparative Summary Table

Table 2

Product Type	World Market ($B)	Asia Market ($B)	Sri Lanka Market ($M)	Southern Province Share (%)	Growth Potential (SP)
Eco-Tourism	181	60	600	35	High
Cultural Tourism	1200	400	1100	30	High
Agro-Tourism	60	18	50	40	High
Wellness Tourism	814	240	350	25	High
Beach/Marine	400	120	1500	45	Very High

Adventure Tourism	366	100	120	30	High
Community-Based	50	15	35	40	High
Heritage Tourism	700	220	900	35	High
Medical Tourism	100	60	30	<5	Low
Sports/Event	800	200	80	20	Moderate
Urban/City	1500	500	400	10	Moderate

Comparative Descriptive Analysis of Tourism Products

1. Eco-Tourism
   - Worldwide: Eco-tourism is one of the fastest-growing segments, valued at $181 billion with over 14% annual growth. Destinations like Costa Rica, Kenya, and New Zealand are global leaders, offering pristine natural environments, wildlife safaris, and eco-lodges. The focus is on sustainability, conservation, and community benefit[2].
   - Asia:Asia's eco-tourism market is robust ($60B+), with hotspots in Borneo, Nepal, and India. Rainforest trekking, wildlife reserves, and marine parks are popular, and there's a strong trend toward responsible travel and community involvement.
   - Sri Lanka: Sri Lanka is emerging as an eco-tourism destination ($600M+), with Sinharaja Rainforest, Yala, and Udawalawe National Parks drawing nature enthusiasts. The country is leveraging its biodiversity but still has room to improve infrastructure and marketing.
   - Southern Province:The Southern Province contributes about 35% of Sri Lanka's eco-tourism. With Sinharaja and Kanneliya rainforests, Bundala National Park, and mangrove safaris, it's well-positioned for further development. Opportunities exist for more guided tours, birdwatching, and eco-lodges[7].
2. Cultural Tourism
   - Worldwide: Cultural tourism is a $1.2 trillion market, with heritage sites, museums, and festivals as major draws. Europe and Asia dominate, and there's a growing trend for immersive and experiential cultural travel.
   - Asia:Asia's cultural tourism ($400B+) thrives on ancient temples (Angkor Wat, Kyoto), festivals, and culinary experiences. Travelers seek authentic local traditions and crafts.
   - Sri Lanka:Sri Lanka's cultural tourism ($1.1B+) is anchored by UNESCO sites (Sigiriya, Kandy, Galle Fort), ancient cities, and vibrant festivals. There's strong appeal for heritage and spiritual travelers.
   - Southern Province:About 30% of Sri Lanka's cultural tourism is in the South, with Galle Fort, Kataragama Temple, and local festivals. There's potential for more immersive storytelling, cultural workshops, and heritage trails.
3. Agro-Tourism
   - Worldwide:Agro-tourism is a niche but growing segment ($60B), popular in Europe and North America with farm stays, vineyard tours, and rural experiences.
   - Asia: Asia's agro-tourism ($18B+) includes rice terraces (Bali, Philippines), tea plantations (India, Sri Lanka), and fruit farms. It's driven by interest in local food and rural lifestyles.

- Sri Lanka: Sri Lanka's agro-tourism ($50M+) is centered on tea and cinnamon plantations, spice gardens, and farm stays, offering hands-on experiences in harvesting and processing.
- Southern Province:The Southern Province accounts for about 40% of Sri Lanka's agro-tourism, with cinnamon and tea estates, plantation tours, and farm-to-table experiences. There's high potential for expansion and marketing.

4. Wellness Tourism
- Worldwide:Wellness tourism is booming ($814B), with spas, yoga, Ayurveda, and medical wellness. Europe, Asia, and the Americas are leaders, and post-pandemic, there's a strong focus on holistic health.
- Asia:Asia's wellness market ($240B+) is driven by Ayurveda (India, Sri Lanka), Thai massage, Japanese onsens, and luxury spa resorts. Wellness retreats and digital wellness are trending.
- Sri Lanka:Sri Lanka's wellness tourism ($350M+) is built on Ayurveda, yoga, and meditation. The country is recognized for its traditional healing and holistic retreats.
- Southern Province:The South holds about 25% of Sri Lanka's wellness market, with Ayurveda resorts, yoga retreats, and spa hotels along the coast. There's room for luxury and integrated wellness experiences.

5. Beach/Marine Tourism
- Worldwide:Beach tourism is a top motivator ($400B+), with the Caribbean, Mediterranean, and Pacific Islands as leaders. Activities include sunbathing, water sports, and marine conservation.
- Asia:Asia's beach market ($120B+) features the Maldives, Thailand, Indonesia, and Sri Lanka, with diving, snorkeling, and island hopping.
- Sri Lanka:Sri Lanka's beach/marine tourism ($1.5B+) is its strongest segment, with Unawatuna, Mirissa, and Arugam Bay famous for surfing, diving, and whale watching.
- Southern Province: The Southern Province dominates, with about 45% of Sri Lanka's beach tourism. Unawatuna, Mirissa, Hikkaduwa, and Tangalle are premier spots, offering surfing, diving, whale/dolphin watching, and turtle conservation[9].

6. Adventure Tourism
- Worldwide:Adventure tourism ($366B) is the fastest-growing segment, appealing to younger travelers with trekking, rafting, diving, and safaris.
- Asia: Asia's adventure market ($100B+) includes trekking (Himalayas), diving (Indonesia, Philippines), and surfing (Bali, Sri Lanka).
- Sri Lanka:Sri Lanka's adventure tourism ($120M+) is developing, with hiking, rafting, surfing, and safaris gaining popularity.
- Southern Province: The South holds about 30% of Sri Lanka's adventure market, with surfing (Weligama, Hikkaduwa), diving, hiking, and cycling. More promotion and infrastructure could boost growth.

7. Community-Based Tourism
- Worldwide:Community-based tourism ($50B+) is growing, offering authentic, responsible travel through homestays and local experiences.
- Asia:Asia's market ($15B+) features village stays (Vietnam, Laos), indigenous tourism (Malaysia, Thailand), and participatory cultural activities.
- Sri Lanka: Sri Lanka's community-based tourism ($35M+) is emerging, with homestays, Vedda culture, and rural crafts appealing to immersive travelers.

- Southern Province:The Southern Province makes up about 40% of this market, with village homestays, craft workshops (mask making, lace), and participatory tourism offering high potential.

8. Heritage Tourism
- Worldwide:Heritage tourism ($700B+) is driven by UNESCO sites, museums, and historical cities, with Europe and Asia dominating.
- Asia:Asia's market ($220B+) includes the Great Wall, Angkor Wat, Galle Fort, and Kyoto, with interactive and digital experiences on the rise.
- Sri Lanka: Sri Lanka's heritage tourism ($900M+) is anchored by Galle Fort, ancient cities, colonial buildings, and museums.
- Southern Province:The South contributes about 35%, with Galle Fort, colonial churches, and temples. There are opportunities for digital storytelling and guided heritage trails.

9. Medical Tourism
- Worldwide:Medical tourism ($100B+) is led by Thailand, India, Singapore, and Turkey, offering affordable, quality healthcare.
- Asia:Asia's market ($60B+) is a global hub for cosmetic, dental, and wellness tourism.
- Sri Lanka: Sri Lanka's medical tourism ($30M+) is emerging, focused mainly on Ayurveda and wellness, with limited infrastructure for international patients.
- Southern Province: The Southern Province contributes less than 5%, mainly through Ayurveda and wellness, with few dedicated medical tourism facilities.

10. Sports/Event Tourism
- Worldwide:Sports/event tourism ($800B+) is a major driver, with events like the Olympics, World Cups, and marathons.
- Asia:Asia's market ($200B+) includes F1 (Singapore), cricket, marathons, and traditional festivals.
- Sri Lanka: Sri Lanka's sports/event tourism ($80M+) includes cricket matches, marathons, and local festivals.
- Southern Province:The South accounts for about 20%, with Galle cricket, surfing competitions, and the Galle Literary Festival.

11. Urban/City Tourism
- Worldwide: Urban tourism ($1.5T+) includes city breaks, shopping, nightlife, and culinary experiences.
- Asia:Asia's urban market ($500B+) features smart cities (Singapore, Seoul), food, shopping, and creative districts.
- Sri Lanka: Sri Lanka's urban tourism ($400M+) is emerging, with Colombo and Galle as key hubs.
- Southern Province:The South holds about 10%, with Galle city tours, boutique shopping, cafes, and creative spaces.

Summary Table with Figures

Table 3

Product Type	World Market ($B)	Asia Market ($B)	Sri Lanka Market ($M)	Southern Province Share (%)	Key Description/Trend
Eco-Tourism	181	60	600	35	Rainforests, safaris, sustainability
Cultural Tourism	1200	400	1100	30	Heritage sites, festivals, local traditions
Agro-Tourism	60	18	50	40	Farm stays, plantations, rural experiences
Wellness Tourism	814	240	350	25	Ayurveda, yoga, holistic health
Beach/Marine	400	120	1500	45	Beaches, surfing, diving, whale watching
Adventure Tourism	366	100	120	30	Surfing, hiking, diving, cycling
Community-Based	50	15	35	40	Homestays, crafts, authentic local experiences
Heritage Tourism	700	220	900	35	UNESCO sites, colonial and ancient heritage
Medical Tourism	100	60	30	<5	Ayurveda, wellness, limited medical facilities
Sports/Event	800	200	80	20	Cricket, surfing events, literary festivals
Urban/City	1500	500	400	10	City tours, shopping, creative spaces

Existing and Emerging Tourism Offerings in Southern Sri Lanka

Existing Tourism Offerings
1   Beach and Marine Tourism
- Key Locations: Unawatuna, Mirissa, Hikkaduwa, Tangalle, Weligama, Bentota
- Activities: Sunbathing, swimming, surfing, snorkeling, scuba diving, whale and dolphin watching (especially from Mirissa), turtle conservation projects (Kosgoda, Rekawa)
- Status: Well-developed and the most popular segment in the region, attracting both domestic and international tourists[6].
2   Eco-Tourism
- Key Locations: Sinharaja Rainforest (UNESCO), Kanneliya Rainforest, Bundala National Park, Madu Ganga wetlands
- Activities: Rainforest trekking, bird watching, wildlife safaris, river and mangrove boat tours

- Status: Established but with potential for further growth through guided tours and eco-lodges.

3   Cultural and Heritage Tourism
- Key Locations: Galle Fort (UNESCO), Kataragama Temple, Mulkirigala Rock Temple, Dutch Reformed Church (Galle)
- Activities: Heritage walks, temple visits, participation in local festivals, exploring colonial architecture
- Status: Well-known sites, but immersive and interactive experiences can be expanded.

4   Agro-Tourism
- Key Locations: Cinnamon plantations (around Galle, Matara), low-country tea estates, spice gardens
- Activities: Plantation tours, cinnamon and tea processing demonstrations, farm stays
- Status: Growing, with opportunities for more hands-on and educational visitor experiences.

5   Wellness and Ayurveda Tourism
- Key Locations: Coastal resorts in Bentota, Galle, Tangalle, Matara
- Activities: Ayurveda treatments, yoga and meditation retreats, spa therapies
- Status: Expanding, with several resorts catering to wellness tourists, especially from Europe and Asia.

6   Adventure Tourism
- Key Locations: Weligama, Hikkaduwa, Sinharaja, rural interior
- Activities: Surfing, diving, snorkeling, cycling, hiking, river safaris
- Status: Surfing is well-established; other adventure activities are emerging and can be further developed.

7   Community-Based Tourism
- Key Locations: Rural villages, Ambalangoda (mask making), Galle (lace making)
- Activities: Village homestays, traditional cooking, local handicraft workshops, participatory rural tourism
- Status: Emerging, with high potential for authentic and responsible travel experiences.

8   Events and Festivals
- Key Events: Galle Literary Festival, local temple festivals, surfing competitions, food and craft markets
- Status: Growing, with potential to attract more international visitors and extend tourist stays.

Emerging Tourism Offerings

1   Digital and Smart Tourism
- Initiatives: AR/VR heritage tours in Galle Fort, digital guides for nature trails, online booking platforms for local experiences[9]
- Potential: Enhances visitor engagement and accessibility, especially for younger and tech-savvy travelers.

2   Culinary Tourism

- Experiences: Food trails, cooking classes, seafood festivals, farm-to-table dining at plantations
- Potential: Taps into global trends for experiential and culinary travel.

3 Wellness Retreats with Integrated Experiences
- Concepts: Combining Ayurveda, yoga, eco-tourism, and local culture in holistic wellness packages
- Potential: Appeals to high-value, health-conscious travelers seeking comprehensive wellness escapes.

4 Agro-Eco Blends
- Experiences: Eco-friendly farm stays, organic farming workshops, permaculture tours
- Potential: Aligns with sustainability and responsible tourism trends.

5 Niche Adventure and Nature-Based Products
- Examples: Birdwatching tours, butterfly trails, river kayaking, guided night safaris
- Potential: Attracts special interest groups and nature enthusiasts.

6 Creative and Artisan Tourism
- Experiences: Hands-on workshops in mask making, batik, pottery, and traditional dance
- Potential: Supports local craftspeople and offers immersive cultural experiences.

Existing and Emerging Tourism Offerings

Table 4

Category	Existing Offerings	Emerging Offerings
Beach/Marine	Surfing, diving, whale watching, turtle projects	Eco-marine tours, underwater heritage trails
Eco-Tourism	Rainforest walks, safaris, birdwatching	Night safaris, digital nature guides
Cultural/Heritage	Galle Fort, temples, colonial tours	AR/VR heritage tours, living history experiences
Agro-Tourism	Plantation tours, farm stays	Organic farm workshops, permaculture stays
Wellness/Ayurveda	Ayurveda resorts, yoga retreats	Integrated wellness-eco-cultural packages
Adventure	Surfing, hiking, cycling	River kayaking, butterfly/birding trails
Community-Based	Village homestays, craft workshops	Social impact tourism, participatory rural tourism
Events/Festivals	Literary, temple, surfing events	Culinary festivals, international sports events
Culinary	Local cuisine, seafood, market visits	Cooking classes, food trails, farm-to-table dining
Digital/Smart Tourism	-	Digital guides, AR/VR tours, online experience hubs

Evaluating the Appeal of Diversified Tourism Products to Different Market Segments.

Each tourism product appeals to distinct visitor segments, both traditional and niche. Matching product types to market preferences allows for targeted development strategies.

Table 5

Tourism Product	Main Market Segments Attracted
Eco-Tourism	Nature lovers, eco-conscious, students, educational groups
Beach/Marine	Families, adventure seekers, luxury travelers, backpackers
Cultural/Heritage	Cultural enthusiasts, pilgrims, older travelers, students
Agro-Tourism	Rural/experiential, families, culinary tourists, eco-visitors
Wellness/Ayurveda	Wellness seekers, middle-aged, international, spiritual
Adventure	Young adults, adventure/sports, backpackers, special interest
Community-Based	Responsible, cultural explorers, long-stay, volunteers
Events/Festivals	Cultural, literary, arts, surfers, foodies
Culinary (Emerging)	Foodies, cultural, urban travelers
Digital/Smart (Emerging)	Tech-savvy, young adults, international, independent

How Diversified Tourism Products Contribute to Economic Sustainability and Local Development

Tourism product diversification contributes to sustainable local economies in several measurable ways
Summary Table: Economic Sustainability and Development Impact [2]

Table 6

Tourism Product	Economic Sustainability Impact	Local Development Impact
Eco-Tourism	Diversifies income, supports conservation	Empowers guides, funds conservation, skill growth
Beach/Marine	High revenue, risk of seasonality	Supports hospitality, creates jobs
Agro-Tourism	Adds rural income, supports agriculture	Empowers farmers, promotes sustainable farming
Wellness/Ayurveda	Attracts high-value tourists, year-round business	Supports local healers, preserves traditions
Adventure	Attracts youth, spreads tourism to new areas	Encourages entrepreneurship, builds infrastructure
Community-Based	Inclusive growth, reduces leakage	Empowers women/youth, preserves culture
Heritage/Cultural	Funds preservation, attracts diverse markets	Maintains sites, supports artisans
Events/Festivals	Boosts off-peak revenue, diversifies offerings	Engages communities, builds pride

These findings illustrate the potential of tourism diversification as a catalyst for rural development, cultural preservation, income generation, and environmental stewardship in the Southern Province [3][6].

CONCLUSION

Conclution of Comparative Market Analysis with Numerical Values. [*Table 1*,*Table 2*][2]

- Southern Province stands out in beach/marine, eco, heritage, and agro/community-based tourism, with significant growth potential.
- Sri Lanka can capture more value by diversifying and upgrading tourism products, especially in wellness, adventure, and rural experiences.
- Asia leads in cultural, wellness, and medical tourism, with strong growth in eco and adventure segments.
- Globally, sustainability, authenticity, and experiential travel are key trends driving growth.

Conclution of Comparative Descriptive Analysis of Tourism Products.[*Table 3*][3][7]

- Globally and in Asia, eco, cultural, wellness, and beach/marine tourism are the largest and fastest-growing segments.
- Sri Lanka is strong in beach/marine, eco, and cultural tourism, with growing potential in wellness, adventure, agro, and community-based tourism.
- Southern Province stands out in beach/marine, eco, heritage, agro, and community-based tourism, with high potential for further diversification and sustainable development, as suggested in your research focus.

This comparative, descriptive analysis-supported by market figures-provides a practical foundation for assessing the current state, opportunities, and trends for diversified tourism products in the Southern Province of Sri Lanka.

Conclution of Existing and Emerging Tourism Offerings in the Southern Province of Sri Lanka.[*Table 4*] [5][9]

The Southern Province of Sri Lanka boasts a rich mix of established and emerging tourism products:
- Existing offerings are strong in beach/marine, eco, and heritage tourism, with growing strength in wellness, agro, and adventure.
- Emerging products are leveraging digital innovation, culinary experiences, and community-based models, aligning with global and Asian tourism trends.

By further diversifying and upgrading these products, the region can attract a wider range of visitors, increase economic benefits, and support sustainable local development.

Conclution of Evaluating the Appeal of Diversified Tourism Products to Different Market Segments.[*Table 5*][6]

The diversified tourism products in the Southern Province of Sri Lanka appeal to a wide range of market segments:
- Traditional segments (families, culture seekers, wellness travelers)
- Emerging and niche segments (adventure seekers, foodies, tech-savvy travelers, responsible tourists)

Conclution of how Diversified Tourism Products Contribute to Economic Sustainability and Local Development[*Table 6*]

Diversified tourism products in the Southern Province of Sri Lanka are crucial for economic sustainability and local development.They create jobs, empower communities, support local industries, and encourage conservation-ensuring that tourism benefits are widely shared and sustainable for the long term.

REFERENCES

1. P. F. (Pvt) Ltd. (2021). Study on inclusive tourism value chain development in Sri Lanka: The Livelihood and Enterprise Development Technical Programme.

2. USAID Indo-Pacific Opportunity Project (IPOP). (2023). An impact assessment of the tourism industry in Sri Lanka and the benefits of adopting sustainable practices.

3. Ravindra, D., & Nawarathna, B. (2020). Tourism and SME development: Performance of tourism SMEs in coastal tourist destinations in southern Sri Lanka. Asian Development Bank Institute.

4. Kamble, Z., & Bouchon, F. (2014). Tourism planning and a nation's vision: A review of the tourism policy of Sri Lanka. Procedia - Social and Behavioral Sciences, 144, 229–236.

5. Guruge, M. L. (2019). Analysis of potential and prospects of tourism development in poverty alleviation in Southern Province of Sri Lanka. Journal of Tourism Economics and Applied Research, 3(1), 15–27.

6. Ganeshan, K., & Silva, D. A. C. (2023). Domestic tourism for a sustainable Sri Lanka: A case study of Uva Province. International Journal of Sustainable Tourism, 12(2), 55–70.

7. Fonseka, N., & Kottage, H. P. (2021). Analysis of the potentials for promoting Sri Lanka as a wellness tourism destination. SEUSL Journal of Marketing, 6(1), 20–34.

8. Unknown author. (2016). A case study on tourism developments in Arugam Bay tourism destination from stakeholders' perspective.

9. International Labour Organization. (2020). Platformization of the tourism sector in Sri Lanka. Geneva: ILO.

THE INTERPLAY OF ETHICS, TRANSPARENCY, AND REPUTATION MANAGEMENT IN THE TOURISM INDUSTRY

Cynthia Ndieri Tiokeng
Latvia
Baltic International Academy
Master in Enterprise Management in the Leisure and Entertainment Industry
tiokengndieri@gmail.com

Irina Popova
Latvia
Baltic International Academy
Dr.paed., Assistant Professor
irenepopova@hotmail.com

Scientific Supervisor:
Dr.paed. Irina Popova

ANOTĀCIJA

Tūrisma nozarē uzņēmuma reputācijas pārvaldībā nedrīkst ignorēt pārredzamības un ētiskas komunikācijas nozīmi. Tas ir tāpēc, ka godīga komunikācija par cenām un pakalpojumiem palīdz uzlabot uzņēmuma uzticamību. Ētiska prakse, piemēram, kultūras cieņa, atbildīgs tūrisms un godīgs mārketings, veicina klientu lojalitāti un mazina pārpratumus, savukārt pārredzamība palīdz veidot efektīvu komunikāciju un uzticēšanos, kas ir ceļš uz spēcīgu reputācijas pārvaldību jebkura uzņēmuma ilgtermiņa panākumiem. Pētījums parāda, ka ētikas un pārredzamības integrācija ne tikai uzlabo zīmola reputāciju, bet arī veicina noturību izaicinājumu priekšā.

Atslēgvārdi: Caurspīdīgums, Ētiskā prakse, Komunikācija, Reputācijas pārvaldība, Tūrisms

ABSTRACT

In the tourism industry, the significance of transparency and ethical communication cannot be overlooked in a company's reputation management. This is so because honest communication about pricing and services helps to elevate the credibility of the company. Ethical practices like cultural respect, responsible tourism, and honest marketing boost customer loyalty and minimize misunderstandings while on the other hand, transparency aid in building effective communication and trust which is the road way to a strong reputation management for the long-term success of any business. The study demonstrates that the integration of ethics and transparency not only elevates a brand's reputation but also foster resilience in the face of challenges.

Keywords: Communication, Ethical practices, Reputation management, Tourism, Transparency

INTRODUCTION

In the contemporary tourism industry, keeping a positive reputation is important for success, however, maintaining a positive reputation can be challenging especially when it comes to a dynamic industry like the tourism industry. Ethical behavior and transparency are necessary pillars of reputation management, especially as modern consumers prioritize integrity and accountability in the businesses they support. The tourism industry also has a connection with managing its reputation, customer reviews and recommendations are pivotal in the industry as it is one of the factors that influence other potential clients to decide whether to visit a touristic destination or not.

[1] Tourism businesses function in a unique atmosphere where customer satisfaction is directly influenced by perceptions of honesty, fairness, and social responsibility. This paper explores how ethics, transparency, and reputation management are interconnected and vital to sustainable tourism development. This paper uses a descriptive design to analyze data gotten from a survey conducted in the author's thesis that demonstrates how the interplay of ethical practices and transparency helps to elevate the reputation of a tourism organization.

Ethics in Tourism

The practice of ethics in tourism refers to actions that respect the rights and dignity of all stakeholders-tourists including; employees, local communities, clients, government and the general public. Ethical tourism businesses implement fair labor practices, avoid exploitation, respect local cultures, and strive to minimize environmental harm. These values enhance brand trust and loyalty among increasingly conscientious travelers.

For instance, the United Nations World Tourism Organization (UNWTO) emphasizes responsible tourism that provides better places for people to visit and live in. This vision aligns ethical behavior with long-term business success, given that travelers have become more aware of the socio-economic impact of tourism. [2] To add, Misleading advertisements or exaggerated claims can cause distrust and trigger consumer backlash. Ethics comes in by playing the role of honesty and transparency which avoids putting the company's credibility and reputation at risk. The figure below shows responses from the question ''which ethical guidelines do your organization prioritize.'' This shows that a significant percentage (63%) of tourism organizations prioritize honest and transparent communication.
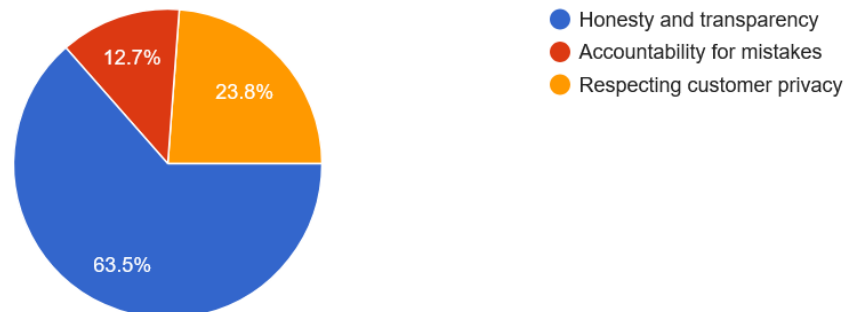

Fig. 1; Responses on how organizations prioritize ethical principles.

Source; Master thesis (2025)

Transparency as a Strategic Advantage

Transparency involves openly sharing relevant information with stakeholders, particularly regarding policies, services, pricing, and challenges. In tourism, transparency could mean clearly communicating cancellation policies, fees, or environmental practices. This also means having honest and clear conversations during crises moments such as natural disasters or pandemics. Other study shows that transparency plays an important role in boosting consumer trust and loyalty in the tourism industry where expectations are high and strong competition. [3] When companies are forthcoming about their practices, it enables consumers to make informed decisions, reducing dissatisfaction and disputes. Moreover, transparency contributes to internal accountability. Staff

and stakeholders are more likely to act ethically when policies are well communicated and organizational practices are visible. This internal clarity translates into better customer service and stronger public relations. Respondents were asked if they agree that transparency is communicating and addressing issues promotes trust within a tourism organization and the figure below shows their responses. 57.1% of respondents strongly agree that transparency builds trust and 39.7% agree to it as well while a very small portion are neutral. This is no doubt that transparency is pivotal in building trust.
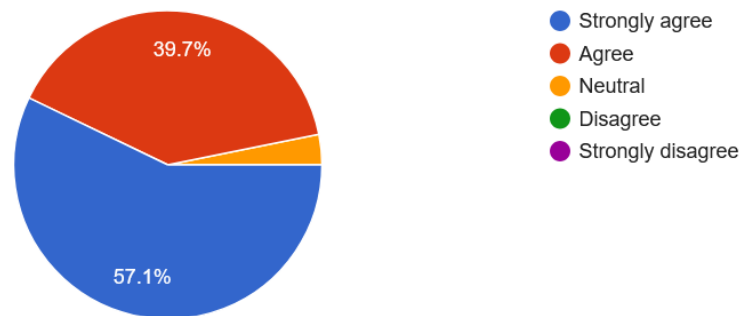

Fig. 2; Responses on if transparency builds trust.

 Source; Master thesis (2025)

Reputation Management in the Age of Digital Tourism

The digital era has transformed how reputations are built and challenged. Online Reviews such as on TripAdvisor, Google, and social media platforms can influence a tourist's decision more than traditional marketing efforts. As a result, reputation management has become a proactive effort involving continuous monitoring, engagement, and service delivery. Effective reputation management means more than responding to negative reviews; it involves actively promoting positive experiences, rectifying problems, and aligning business practices with ethical and transparent values. [4] Many businesses now invest in social listening tools and customer relationship management systems to identify issues early and mitigate reputational damage. Moreover, tourism brands that are known for ethical conduct and transparency often receive free advocacy from loyal customers, influencers, and journalists. This organic advert can serve as a competitive edge in saturated markets.

The Synergy Between Ethics, Transparency, and Reputation

These three components are interdependent. Practicing ethical values lay the foundation for building trust; transparency strengthens the trust and a good reputation is the natural outcome. On the other hand, unethical behavior and practices can cause devastating reputational damage. For instance, during the COVID-19 pandemic, tourism companies that refused to refund bookings or failed to communicate properly with clients suffered reputational damage.[5] Contrarily, businesses that maintained transparency and prioritized customer well-being were praised and often gained new customers post-crisis. The figure below shows how ethical practices and transparency impacts

a company's reputation. From the findings, it is clear that a good reputation is significantly dependent on ethical values and transparency in communication across all stakeholders' level as a greater portion of 57.1% has a positive impact, 36.5% has a strong positive impact with a very small portions of neutral and negative impacts.
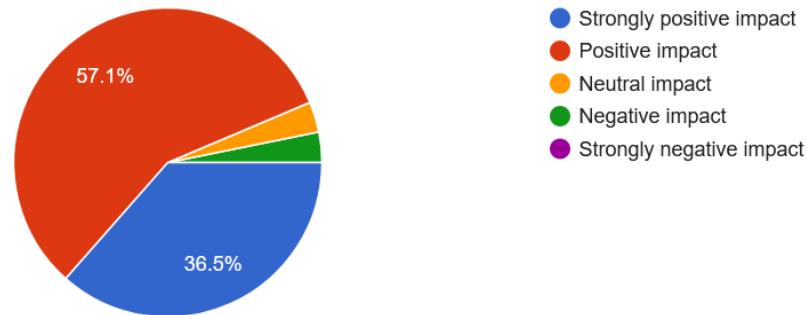

Fig 3; The impact of ethics and transparency on a company's reputation.

Source; Master thesis (2025).

CONCLUSION

In sum, ethics and transparency are not peripheral to tourism-they are central to its sustainability and success. As tourism continues to develop in a more socially and environmentally conscious direction, reputation management must also grow along side. Tourism companies that dwell with ethical practices and transparency into their business will enjoy greater customer loyalty, resilience, and long-term success in an increasingly competitive industry. A strong reputation built on ethics and transparency not only attract more customers, it promotes resilience. Tourism businesses with ethical foundations are better prepared to manage crises, adapt to social trends, and meet evolving consumer needs.

REFERENCES

1. Kosikova Michaela et al. (2023), Online reputation management of a selected tourism facility. Retrieved from https://www.researchgate.net/publication/368543453_Online_reputation_management_of_a_selected_tourism_facility

2. UNWTO. Org, Responsible Tourism. Retrieved from https://www.unwto.org/sustainable-development.

3. eHotelier (2016), Transparent hospitality - are we what we say we are? Retrieved from

https://insights.ehotelier.com/insights/2016/09/07/transparent

4. Fredrik (2025). Hotel Reputation Management; 9 recommendations for hotels in 2025. Retrieved from https://www.lingio.com/blog/hotel-reputation-management

5. Yang Ting-Tang et al (2024), Make the Effort Visible: The Effect of Process Transparency on Public Forgiveness in Tourism Crisis Communication. Retrieved from https://www.researchgate.net/publication/377443343_Make_the_Effort_VisibleThe_Effect_of_Process_Transparency_on_Public_Forgiveness_in_Tourism_Crisis_Communication

THE EUROPEAN UNION AND EUROPEAN VALUES

EIROPAS SAVIENĪBA UN EIROPAS VĒRTĪBAS

CONTEMPORARY AND MODERN ART AND INSTITUTIONAL PRESERVATION: HOW MUDAM MUSEUM OF MODERN ART SHAPES LUXEMBOURG'S CULTURAL PRESENT

Margaryta Aleksandrova,
Luxembourg University, BCE
Taras Shevchenko Kyiv National University (Kyiv, Ukraine)
margaryta.aleksandrova.001@uni.lu
Scientific Adviser:
Petro Kotlyarov
Doctor of Historical Sciences,
Head of the Department of Art History
Taras Shevchenko Kyiv National University (Kyiv, Ukraine)

ANNOTATION

The article explores the role of museums in definition, appreciation and preservation of contemporary and modern art taking MUDAM as an example. Reflecting the crucial changes in social and humanitarian values, contemporary and modern art need to find reliable and steady institution that gets a power to assert authoritatively that the art object is a confirmed work of art. The dynamic development of art, its evolution, accepting new revolutionary art means and materials, the changes it undergoes today strengthen the role of the museums and impose on these institutions new functions, as they act as a link between an artist and a viewer. New art demands new platform, finding its way to the viewer and proving its legacy.

ABSTRACT

This research explores the role of contemporary art museums and their role in defining and legitimizing of Contemporary art based on Luxembourg's MUDAM (Musée d'Art Moderne Grand-Duc Jean) as a primary case study. The research investigates how contemporary art museums have transformed from traditional repositories into dynamic "laboratories" that get the final word in art validation process.

The temporal and experimental nature of contemporary art, characterized by diverse media, unconventional materials, and conceptual ambiguity, needs explanation and recognition. Modern and Contemporary Museums function as validators, working in partnership with creators and viewers to establish artistic legitimacy. Through examination of MUDAM's curatorial practices, architectural design, and collection development since its opening, the research demonstrates how contemporary art institutions serve as cultural ambassadors.

The analysis reveals that contemporary art museums have acquired unprecedented ideological influence, functioning not merely as exhibition spaces, but as active participants in cultural discourse. The study explores how these institutions navigate the tension between revolutionary artistic expression and established cultural values, using examples from MUDAM's collection, particularly works by Luxembourg-born artist Michel Majerus. The research demonstrates how museums' architectural choices, curatorial decisions, and exhibition strategies collectively shape public perception and institutional validation of contemporary art.

The study concludes that these institutions bear significant responsibility for determining which art objects will be preserved as cultural evidence of our "cultural mark", highlighting the critical importance of their curatorial choices in shaping cultural legacy.

Keywords: Contemporary art, modern art, institutional validation, artist, art object, audience, viewer, museum, MUDAM, traditional approach, contemporary perspective, temporality, legitimacy

INTRODUCTION

The temporal nature of contemporary art, the wide range of means and material, its vague hints that take place of clear eternal ideas - all these factors create a perfect ground for doubts and

disputes whether an object can be recognized as an art object. The new reality implies that the process of creation and recognition of a new work of art requires several participants: the artist, the viewer, and the independent expert, an arbiter, whose recognition legitimize the work of art. The artist whose ideas are controversial, whose choice of materials and means can be revolutionary, needs to get a certain "admission" or "approval" of a new institution called Modern and Contemporary Museums. The new type of museums work as laboratories. Their open nature and dialogue with the viewer presuppose new perspective, new approaches, new type of narration.

BASIC THEORETICAL AND PRACTICAL PROVISION

Museums are accepted by the humankind as receptacle of human endeavour and knowledge, they preserve historical articles and treasure art objects. For many years the museums have been preserving masterpieces, historical articles and art objects, either remaining contemporaries of the living artists or being the institutions keeping the ancient articles for the descendants [7]. Nowadays the museums of Contemporary and Modern Art get the role of powerful institutions. Contemporary and Modern Art challenge the nature of the museum itself. Maintaining status of timeless treasury, museums unintentionally make the final decision on "legitimacy" of any art object, accepting it and keeping it in the history of art.

It is evident that the functional of Contemporary and Modern Art Museums is really wide. First of all they exhibit the collections or art objects created by the artists including installation and performance, museums introduce new works to the audience and discover new names. But they also prove to become "a laboratory of learning, a place where the most challenging and difficult art of our time can be measured against the achievements of the immediate past" [4].

Contemporary Art proves the aesthetic and intellectual processes that characterise our time. It manifests itself in the visual art, installation art, performance art, digital art, sound art and even Al-generated art [8]. All the above impose special responsibilities on the contemporary museum, which can no longer remain merely a convenient architectural structure, but rather functions as a laboratory, where the viewer through research explores the art object. Furthermore, the museum performs the functions of an ideological institution, as contemporary art is focused on certain problems, discusses political issues and particular set of values. It has power to give floor to revolutionary ideas or to ban certain projects. The ideological influence the museum obtains can be compared to the influence of art itself. This comes from the fact that Modern and |Contemporary Art Museums became partners, not just depositories. Their function transforms into more serious institutionary mission. They work in partnership with the creator and the audience finding the new evidences and confirming that the new object is art object. Evaluation, recording new art events, promotion – all these come to museum activity.

It is clear that not any object can claim to be an art object, otherwise any canvas painting randomly bought in a street would claim to be an art object, leaving far behind Maurizio Cattelan's banana (part of work called Comedian) But this is not true, right because the museum and audience are to define a canon of contemporary art.

Contemporary art left a pedestal in the XXth century to find its way to the viewer and to communicate immediately. Being close to the audience and showing all the shadows of our life whether flattering or horrifying it can be the witness of the times, the reflection of our being. Modern and Contemporary Art Museum that are established in the cities step into the role of Contemporary Art Ambassadors.

The Contemporary Art Museum of Luxembourg – MUDAM launched in 2006 serves as a reference museum for contemporary art that strives to embody artistic, architectural and cultural

excellence. Collaborating with artists, it shapes cultural life in Luxembourg, and reflects the contemporary world.

The historical site of the Fort Thüngen was chosen by the well-known architect Ieoh Ming Pei to construct the Musée d'Art Moderne Grand-Duc Jean (Mudam) [10]. The choice was criticized by some locals, but the architect stood his ground, his idea was to show the continuity of times and progression of art trends. The style of the architect who is the author of Piramide du Louvre built in 1989, is rocognizable and innovative, and the fact that the building of MUDAM resembles the Piramide that welcomes the viewer to Louvre also shows inseparability of new era of contemporary and modern art which is alien to borders and restrictions. "The simple volumes and generous spaces and the play between interior and exterior with views onto the surrounding Park Dräi Eechelen are covered with an audacious glass canopy. I. M. Pei's use of the honey-coloured limestone known as Magny Doré endows the building with a distinctive luminosity animated by subtle plays of light and shadows across the day and the seasons" A world renowned architect. An award-winning park design [10].

Located on the Kirchberg-Plateau, between the Place de l'Europe and the Old Town of Luxembourg, founded on the old walls of the fortress, MUDAM proves that art is inalienable part of evolution and progress.

The public and exhibition spaces are laid out on three levels over 4.000 m2. The Grand Hall is large and spacy, full of light thanks to glass roof. It shows that there is new space for new ideas. Sometimes it is used as exhibition premises, and sometimes- to welcome the viewers.

Though it may seem that the museum has the program without a permanent collection, giving floor to the artists from all over the world, proposing temporary expositions and presentation of works from the collection, the collection of MUDAM consists of more than 800 works of art in all media created by artists from Luxembourg and around the world. "The constitution of the collection traces back to the first acquisitions for the museum in the 1990s, the creation of the Museum of Modern Art Grand-Duc Jean Foundation in 1998, and the opening of the Museum in 2006" The most important collection of contemporary art in Luxembourg Mudam

Museum's curatorial team decide about collections in Musée d'Art Moderne. Curators play a key role in developing exhibition projects and shaping the museum's strategic artistic direction.

The curatorial team includes specialists such as performance curators and curatorial assistants, who work under the guidance of senior curators and the head of the artistic department. They are responsible for research, planning, and execution of exhibitions, as well as collaboration with artists, galleries, and external partners.

Mudam also regularly works with guest curators and artists to create temporary exhibitions and special projects.

Among the artists whose collections were exhibited in MUDAM it is necessary to dwell on Michel Majerus who is an outstanding representative of contemporary art born in Luxembourg (he was born in 1967, Esch-sur-Alzette, Luxembourg) During his short life he produced over forty painted installations. "His work contains a myriad of references from art history (from colour field painting to Pop Art) and popular culture (from comics to electronic music). These quotations are layered and collaged, creating visually saturated compositions that recall the flux of images of the then-burgeoning internet. Majerus' use of these techniques, that combined elements from computer software and video games, was radical for a painter working in the 1990s" [5].

In his SINNMASCHINE (1997), in other words the Sense Machine, the author comprises a metallic floor that fans out in a quarter-circle with seven painted panels placed along its curved edge, marking a change in scale from Majerus' previous work. Though not fully immersive, *SINNMASCHINE* (sense machine) has references to a music album of German band Kraftwerk *The Man-Machine*, and the viewer finds himself on the dance floor, surrounded by vertical coloured

stripes in orange, white, pink and blue. The enormous art object draws the viewer in it, making the viewer a part of art object.

His another work *RUNNING IN CYCLES* created in 2001 before his tragic and unexpected passing, brings a clear and bitter message, - the phrase FUCK THE ARTIST, written in the work, marks a new era in art, where the role of the artist is diminished to the minor part. In this work we clearly see that Majerus is not working as pop-art artist. He loses his vitality and optimism, the changes in global world influenced the artist [11]. His rather pessimistic view and choice of topic, his idea that the artist dissolves in the new era, and the new paradigm shift the emphasis. Born in Luxembourg and creating his works worldwide Majerus is the example of the transformation we all undergo.

Usually, MUDAM houses several exhibitions at the same time, proving the diversity and richness of Contemporary Art. It also has premises for meeting with artists, and if we accept the point that the viewer is as important as the artist, we should confirm that this new possibility is crucially important for the existing and for other art objects to come.

CONCLUSION

Museums remain fundamental public institutions, that confirm to have political, social, cultural and economic influence on society. Nowadays in globalised world, when art loses borders and expand, when anything can claim to be art and anyone can prove he is an artist, when a viewer becomes a co-creator, the role and power of museums is increasing. Starting with the ready-made "Fountain" of Marcel Duchamp dated 1917 and his "In Advance of the Broken Art" dated 1915, new rules on legitimization of work of art were created [3]. For the recognition, there should be several factors: the presence of the artist, the consent of the viewer and the role of the museum or another institution, that confirmed, testified and recorded the new art object. The new hypostasis of the museum changes the procedure of art object recognition. If earlier the museums housed art objects after the official confirmation, Contemporary and Modern Art Museums are empowered to get the final verdict [6]. They act as independent trustworthy party, and their decision to give floor to the artist demonstrates to the society, that they are being presented with true art. The open nature of the museums enables them to work as laboratories working on art objects, looking for possibility to educate, embracing the ideas.

The museums stand for ideas and values. It is impossible to get to exhibition that contradicts human values no matter how provocative art object is. The human values are inviable. Thus, it is also important to consider freedom of the artist and his self-censorship.

The new reality implies certain responsibility on all of us. Artists, viewers, museums – these parties decide what makes contemporary art, what will remain as evidence of our existence, what reflects our time.

REFERENCES

1. Arnason, H.H. (2010) History of Modern Art: Painting, Sculpture, Architecture, Photography. Prentice-Hall, - 832 p.
2. Dempsey, A. (2002) Art in the Modern Era: A Guide to Styles, Schools, & Movements. Harry N. Abrams, - 352 p.
3. Schwartz Arturo (1997). The complete works of Marcel Duchamp. Delano Greenidge Edition, New York, – p. 762
4. Harriet Schoenholw Bee (1999), MoMA Highlights The Museum of Modern Art. The Museum of Modern Art, NY, - 356 p.
5. Margaryta Aleksandrova, Petro Kotlyarov (2024) Installation Art and Performance as reflection of contemporary world. The collection of articles of the XIII International Research-to-Practice Conference "SocietyTransformations in Social and Human Sciences" – p.390

6. Margaryta Aleksandrova, Petro Kotlyarov (2024) Contemporary art. Interconnection of styles. The role of the artist and the role of the viewer. The collection of articles of the XIV International Scientific and Practical Conference "Timeof Challenges and Opportunities: Challenges, Solutions, Perspectives" – p.216
7. Terry Smith (2011) Contemporary Art. Laurence King Publishing Ltd, London, UK, - 348 p.
8. Snøhetta, Davidson, J., Russeth, A., & Solnit, R. (Eds.). (2023). What is a Museum Now? San Francisco Museum of Modern Art
9. Christophe Schinckus (2020) A Visual Epistemology of Readymade. The Journal of Genius and Eminence, Retrieved from: www.creativityjournals.com/a-visual-epistemology-of-readymade
10. Museum of Modern Art (MUDAM) Luxembourg. Retrieved from: www.mudam.com
11. Museum of Modern Art (MUDAM) Luxembourg. Michel Majerus collection. Retrieved from: www.mudam.com/collection/michel-majerus
12. Art Ukraine (2017) Марсель Дюшан — найвідоміший насмішник в історії мистецтва. Retrieved from: www.artukraine.com.ua/a/marsel-dyushan--nayvidomishiy-nasmishnik-v-istorii-mistectva/

FOREIGN EXPERIENCE OF IMPLEMENTING STEM-EDUCATION IN MODERN CONDITIONS

Yulia Kolenko,
Doctor of medical sciences, professor
Bogomolets National medical university
Ukraine, Kyiv

ABSTRACT

The article defines the concept of STEM education, which is considered from the perspective of a promising direction for training students in higher education institutions. The possibility of using the STEM education system in training doctors in specialized universities will improve the quality of student training and increase the competitiveness of graduates in the labor market.

Keywords: education, innovation, technology, higher education institution

АНОТАЦІЯ

У статті визначено поняття STEM-освіти, яке розглядається з позиції перспективного спрямування підготовки студентів у закладах вищої освіти. Можливість використання системи STEM-освіти при підготовці лікарів у профільних ЗВО дозволить покращити якість підготовки студентів та підвищити конкурентоспроможність випускників на ринку праці.

Ключові слова: освіта, інновації, технології, вищий навчальний заклад

INTRODUCTION

In the context of globalization and widespread integration, the leading role is played by the development of skills necessary for the professions of the future related to new technologies, such as artificial intelligence, bio- and nanotechnology, machine learning (bioengineer, biotechnologist, genetic engineer, 3D designer, etc.). Currently, educational institutions need to create an educational environment in which students can apply the acquired knowledge and scientific methods in practice. An approach is needed that includes the integration and interdisciplinarity of academic subjects. In the world, this approach is called STEM.

The term "STEM" is usually used to define a methodology in the field of education or the integration of several disciplines into a single learning scheme. In education, various approaches are distinguished in clarifying concepts: the first approach considers the concept of "STEM" as the integration of natural sciences (Science), technology (Technology), engineering (Engineering) and mathematics (Mathematics); the second approach - Art is added and the concept of "STEAM" arises; the third approach is "STREAM", when the concept includes Research [3].

BASIC THEORETICAL AND PRACTICAL PROVISION

Since the beginning of the 21st century, STEM has become a priority approach of national educational policy in Canada, the USA, Singapore, China, Finland and Japan. This approach allows combining STEM/STEAM education with such trends as BYOD, flipped classroom, gamification, establishing interdisciplinary connections and applying the acquired knowledge in practice, carrying out project and research activities. Countries implementing the STEM approach at the level of state policy occupy leading positions according to the results of international studies TIMSS and PISA in mathematics and natural sciences, and reach a new level of the labor market.

Educational strategies of foreign countries contain solutions for the implementation of the STEM approach at all levels of education and include specially developed programs. For example, in the USA, Great Britain and Australia, recommendations for the implementation of STEM education are recorded in national reports. In many countries (USA, England, Australia, China and Korea), the educational programs are based on an interdisciplinary approach (K-12 STEM) [2].

The main goal of these educational programs is to influence the conscious choice of profession and future career by students. In France, Japan and South African countries, more attention is paid to the implementation of STEM programs in various areas within the framework of competitions, summer camps, and various extracurricular activities aimed at developing interest in STEM professions. As noted earlier, in the USA, Great Britain, and Canada, the STEM approach to education is a priority of national educational policy.

RESEARCH RESULTS AND THEIR EVALUATION

STEM education policy involves training personnel for the high-tech industry and developing STEM literacy for everyone. Accordingly, in American schools, STEM subjects are included in the elementary school curriculum, and in high school, the STEM education program is carried out in cooperation with universities and businesses.

The characteristic features of STEM education include an individual approach, immersion in the topic (can be studied for a month), project-based learning using the STEAM system (product, report), creative thinking, and an interdisciplinary approach. The following points can be highlighted as a resource base: places have been created for the exchange of resources, knowledge, and learning through practical research; workplaces are part of a laboratory, part of a store, part of a conference room; students build and work on projects together, using equipment that is both traditional (woodworking equipment and sewing machines) and state-of-the-art (3D printers makerbot, laser engravers GCC and cutting machines; teaching is built in the format of discussions; problem-based learning is implemented.

Thus, the abbreviation STEM (Science, Technology, Engineering, Math) was coined by employees of the US National Science Foundation in the early 2000s to designate a new educational trend that was supposed to fill the shortage of technical specialists in the country[1]. Since then, the development of STEM has become part of US government policy and then spread throughout the world.

Today, you can get a STEM education at leading universities in the UK, Switzerland, Germany, Singapore, Japan and others. STEM education is not just the study of biology, physics and mathematics as part of the curriculum, but their combination into a new "whole". Disciplines are taught in terms of their connection with each other. This allows you to consider and solve problems more comprehensively and globally, rather than in parts, relying on only one area.

There are constant discussions among experts about what else is and is not included in STEM. For example, medicine, psychology and pharmaceuticals are sometimes included in the field of science. Only in 2019, architecture was recognized as a STEM specialty related to the field of engineering. There is also a lot of debate about whether economics, political and social sciences should be included in STEM.

STEM values and principles:
- Interdisciplinarity is a combination of disciplines into a single system, searching for common ground.
- Creativity and innovation. To solve modern problems, theoretical knowledge is not enough - you need to be able to create new methods, generate ideas and look for ways to implement them in practice.

- Critical thinking is the ability to not take anything on faith, constantly check and analyze information.
- Practical application of knowledge. Educational material is better absorbed if new knowledge is immediately applied to solving applied problems.
- Project-based work. In many STEM specialties, a large part of the curriculum consists of practice and projects. For example, in some programs, work on a diploma is combined with an internship, during which students solve real cases from the work of a partner company. Students gain relevant knowledge and experience, companies gain fresh ideas for solving their problems and potential employees.

CONCLUSION

There is already a major shortage of specialists in high-tech industries in the world. And Ukraine is no exception: we are talking about tens, and maybe hundreds of thousands of workers annually. Active implementation of modern technologies today requires specialists who will develop and support them. The lion's share of needs in the labor market is qualified personnel with computer and information technologies. But there is also talk about specialists in the field of engineering, cybersecurity, healthcare, work with drones, and the like. And it is STEM education that prepares graduates who will cope with the challenges of our time.

REFERENCES

1. Chicago STEM SCHOOL STUDY [Электронный ресурс] URL: http://outlier. uchicago. edu/ s3/
2. The America Creating Opportunities to Meaningfully Promote Excellence in Technology, Education and Science Act of 2007.
3. Z. S. Wilson, S. Y. McGuire, P. A. Limbach, M. P. Doyle, L. G. Marzilli, and I. M. Warner, "Diversifying science, technology, engineering, and mathematics (STEM): An inquiry into successful approaches in chemistry," J. Chem. Educ., vol. 91, no. 11, pp. 1860– 1866, 2014

INTANGIBLE RESOURCES AS A STRATEGIC FACTOR IN THE DIGITAL TRANSFORMATION OF AN ENTERPRISE IN MODERN CONDITIONS

Innola Novykova
Doctor of Economic Sciences, Professor,
Vice-Rector Kyiv Agrarian University
of the National Academy of Agrarian Sciences of Ukraine
Viktor Leshchynsky
Doctor of Law
Associate Professor of the
Department of Agricultural Economics and Management
Kyiv Agrarian University
National Academy of Agrarian Sciences of Ukraine

ABSTRACT

The article assesses the intangible resources of the campaign, identifies the types of intangible resources, examines the main theoretical approaches to the influence of intangible resources on the strategy of the enterprise, and identifies the degree of influence of various types of intangible resources on the digital transformation of enterprises, taking into account the current stage of economic development.

Keywords: intangible resources, digital economy, enterprise, strategy

АНОТАЦІЯ

У статті проведено оцінку нематеріальних ресурсів підприємства, визначено види нематеріальних ресурсів, досліджено основні теоретичні підходи до впливу нематеріальних ресурсів на стратегію підприємства та визначено ступінь впливу різних видів нематеріальних ресурсів на цифрову трансформацію підприємств з урахуванням сучасного етапу економічного розвитку.

Ключові слова: нематеріальні ресурси, цифрова економіка, підприємство, стратегія

INTRODUCTION

In modern conditions, it is of interest to find out the reasons for differences in the efficiency of enterprises in similar markets under similar external conditions. In recent decades, researchers agree that such differences can be explained by the heterogeneity of resources and the ability of companies to use them. This idea is considered in detail within the resource-based view [1]. Since the end of the last century, along with the beginning of the transition to a new economy, intangible resources, or intellectual capital, have been considered as such resources capable of generating competitive advantages [2,3]. The transition from heavy industry to an economy based on new technologies is accompanied by an increase in the role of intangible resources, including structural capital [4,5], which makes them key factors in achieving sustainable growth and competitiveness.

BASIC THEORETICAL AND PRACTICAL PROVISION

Within the framework of the specified topic, one of the key issues is the identification of company strategies in relation to the use of intangible resources that can ensure differences in the success of companies. Modern researchers are trying to discover certain patterns of behavior - strategies that are characteristic not of one company, but of a group (or clusters) of companies. This

direction is known as the theory of strategic groups. The main studies of strategic groups include the typology of Miles [6] and business strategies proposed by Porter [7]. Existing studies show that the specifics of a company's strategy in relation to the intangible resources available to it can be a source of creating competitive advantages.

In the work of Shakina and Barajas [8], a typology of European companies in relation to intangible resources is proposed: the authors identified three types of strategies based on intangible assets, namely innovative, conservative and moderate strategies. In addition, scientists have confirmed that companies that focus on investing in intangible resources outperform their competitors in terms of economic and market added value. We operationalize the intangible resources of the company, including digital structural capital, and examine the strategic behavior of companies in relation to intangible resources. For this purpose, a set of strategies based on intangible resources has been developed, which are located between the poles: "generics" (universal or traditional companies, i.e. those with a below-average level of intangible resources) and "smart" companies (intensifying intangible resources and endowed with them above the average level). In this case, the set means that different strategies of companies are based on different combinations of intangible resources.

Considering all aspects of intangible resources makes it possible to understand how they relate to each other and to more fully describe the strategic behavior of companies in relation to intangible resources and their ability to generate competitive advantages. The main idea of the resource-based approach is that the competitiveness of a company depends on the specific resources it has [9]. This approach implies that a company can gain a competitive advantage through the proper use of both tangible and intangible resources. In the knowledge-based economy, intangible resources are theoretically and empirically recognized as drivers of competitiveness due to their specificity, which makes them valuable, rare, inimitable and non-substitutable. Given the significant number of definitions of the term "intangible resources", we note that in our study we use the version proposed by Christandl and Bontis [10], who describe such resources as "strategic resources of a firm that enable an organization to create sustainable value but are unavailable to a large number of firms."

RESEARCH RESULTS AND THEIR EVALUATION

We use an intellectual capital structure that includes four types of resources: human capital (HC), client capital (CC), innovation capital (InnC) and process capital (PrC). Human capital includes competencies, skills and other qualities of employees. Instead of client capital, we use relational capital (RC), which is a broader concept and includes relationships with various agents: suppliers, clients and partners. Structural capital is represented by innovation and process capital, which allows us to isolate and analyze the latter component, reflecting the digital aspects of the company's structural capital.

Analysis of strategic groups allows us to study the relationships between various strategies and the company's performance. One of the most well-known strategic typologies, presented by Miles et al. [6], implies that each company goes through an adaptive cycle in order to solve entrepreneurial (product and market sphere, growth policy, etc.), engineering (technological tasks and technological scope) and administrative (organizational structure and control) tasks. Based on how companies cope with these tasks, the authors proposed the following typology of companies: defenders, analyzers and prospectors [6].

The typology of strategies proposed by Porter [7] describes how a company gains a competitive advantage in a selected market. A company determines its positioning in the market depending on whether it is focused on profitability above or below the industry average. In relation to market size, there are three strategies for achieving above-average performance in the industry:

cost leadership, differentiation and focus. A company that pursues a cost leadership strategy, as a rule, becomes a low-cost manufacturer in its industry. The differentiation strategy is suitable for companies that seek to have unique qualities that determine the choice of customers. "Focusers" choose a specific segment of consumers.

Structural capital is represented by two types of capital - process and innovation. It is process capital that reflects the digital dimension of structural capital, since it represents technologies, software, databases, automation systems, etc. Research argues that process capital is crucial for strategic planning and company operations and is a strategic resource that creates competitive advantages for the company. Measuring process capital is possible through resources invested in changing business processes and the results of changed business processes [11]. Invested resources are usually represented by expenses on new technologies, and the results of changes lead to increased process efficiency, that is, they can be measured through productivity.

Typologies of strategies in relation to intangible resources usually focus on a specific type: human, relational, innovative or process capital. It is quite difficult to propose a general approach to identifying strategic groups. Therefore, we assume that the average level of provision with intangible resources should be considered as basic: if a company is provided with resources below average, it will follow a generally accepted strategy that is not focused on generating competitive advantages. Another strategy of the company assumes the accumulation of knowledge above the average level of endowment with intangible resources. Such behavior can be called a "smart strategy", which, in accordance with the resource-based approach, contributes to the formation of competitive advantages. At the same time, between these polar strategies there should be a certain set of strategies in relation to specific types of intangible resources. For example, if a company actively uses human capital and has a reserve of this resource above average, then other types of intangible resources may be at an average level or below. In this case, the company's behavior can be interpreted as a strategy focused on human resources. Within this set of strategies, there are many types of behavior with respect to intangible resources, considering the average level of provision as a threshold value. This set of strategies regarding the company's intangible resources can be a good starting point for an academic discussion in the field of strategic management of such resources.

We have identified profiles that can be considered as a special case within the framework of the considered concept. The moderate profile is equivalent to the general strategy, while the conservative and innovative profiles are between the general and "smart" strategies. The set of strategies contains all types of strategic profiles that can be obtained through various combinations of types of intangible resources. As noted, our study uses a classification of intangible resources based on their division into four types: human capital (HC), relational capital (RC), innovative capital (InnC) and process capital (PrC). Taking this into account, the set of strategies can be represented by different strategic models of behavior depending on the active use of one or more types of intangible resources. When considering all types of intangible resources, sixteen strategies can be formed within five possible strategic groups: - one general profile without intensification of intangible resources ("generic");

- four strategic profiles with strengthening of one type of capital;
- six strategic profiles, when the company strengthens the use of two of the four types of intangible resources;
- four strategic profiles with strengthening of three of the four types of intangible resources;
- one strategic profile ("smart"), when the company intensifies all four types of intangible resources.

CONCLUSION

Thus, the issue of the average level of knowledge provision requires clarification. It is assumed that the average level can be determined at the global, country or regional levels. However, the industry level can also be used as a benchmark for determining strategic behavior with respect to intangible resources. The study also developed a set of strategies for intensifying intangible resources. This concept can form the basis for studying various strategic configurations with an emphasis on specific types of intangible resources. In accordance with the theory of strategic groups, competitive advantages can be built around various configurations of intangible resources. Using four components of intellectual capital, 16 possible profiles of strategic behavior were obtained. Depending on the level of endowment with intangible resources, companies are distributed from "generics" whose stock of intangible resources is below average, to "smart" companies whose stock of intangible resources, on the contrary, is above average. The results of the study showed that among the 16 possible strategic profiles, companies can be characterized by three types. According to the results of the cluster analysis, the companies either adhere to two polar strategies ("generics" and "smart" companies), or are part of the group of companies that prefer to intensify three types of intellectual capital - human, relational and process. When comparing companies, one can observe a kind of balance between process and innovative capital: if the former are better equipped with information technologies (ERP system, knowledge management system, website quality), then the latter invest more in R & D and have a higher level of provision with patents and intangible resources. It is important to note that the study has a number of limitations. Firstly, the division of intangible resources into four components used limits the number of possible strategic groups within the set of strategies based on intangible resources to sixteen options. Secondly, the metrics used to measure intangible resources should be considered as approximate indicators that cannot reflect the entire essence of the company's intellectual capital.

REFERENCES

1. Barney, J., Wright, M., & Ketchen, D. J. (2001). The resource-based view of the firm: Ten years after 1991. Journal of Management, 27(6), 625–641
2. Stewart, T. (1998). Intellectual capital: The new wealth of organizations. Doubleday.
3. Sveiby, K. E. (1997). The Intangible Assets Monitor. Journal of Human Resource Costing & Accounting, 2(1), 73–97.
4. Lönnqvist, A., Sillanpää, V., & Carlucci, D. (2009). Intellectual capital management in practice: Assessment of implementation and outcomes. Knowledge Management Research & Practice, 7(4), 308–316.
5. Taylor, L. (2007). Knowledge, information and the business process: Revolutionary thinking or common sense? Elsevier.
6. Miles, R. E., Snow, C. C., Meyer, A. D., & Coleman Jr., H. J. (1978). Organizational strategy, structure, and process. Academy of Management Review. Academy of Management, 3(3), 546–562
7. Porter, M. E. (1980). Competitive Strategy: Techniques for Analyzing Industries and Competitors. Competitive Strategy, 1(6), 396.
8. Shakina, E., & Barajas, A. (2015). Intangible-intensive profile of a company: The key to outperforming. Journal of Intellectual Capital, 16(4), 721–741
9. Peppard, J., & Rylander, A. (2001). Using an intellectual capital perspective to design and implement a growth strategy: The case of APiON. European Management Journal, 19(5), 510–525.
10. Kristandl, G., & Bontis, N. (2007). Constructing a Definition for Intangibles Using the Resource Based View of the Firm. Management Decision, 45(9), 1510– 1524.
11. Shang, S. S. C., & Wu, Y. (2013). Measuring process capital from a system model perspective. Business Process Management Journal, 19(4), 662–679.

ASSESSMENT OF THE EFFICIENCY FUNCTIONING OF REGIONAL NETWORKS HIGHER EDUCATIONAL INSTITUTIONS IN A COMPETITIVE CONDITION

Oleksandr Nykytyuk,
Doctor of Agricultural Sciences, Professor,
Rector Kyiv Agrarian University
National Academy of Agrarian Sciences of Ukraine
Olesya Lynovytska,
Doctor of Philosophical Sciences, Professor
First Vice-Rector
Kyiv Agrarian University
National Academy of Agrarian Sciences of Ukraine
Innola Novykova,
Doctor of Economic Sciences, Professor
Vice-Rector
Kyiv Agrarian University
National Academy of Agrarian Sciences of Ukraine

ABSTRACT

The issues of efficiency and expediency of functioning of networks of higher education institutions are analyzed, the influence of higher education institution on economic development of each individual region is assessed, criteria for assessing the efficiency of functioning of regional networks of higher education institutions in conditions of competition are substantiated.

Keywords: higher education institution, region, efficiency

АНОТАЦІЯ

Проаналізовано питання ефективності та доцільності функціонування мереж закладів вищої освіти, оцінено вплив закладів вищої освіти на економічний розвиток кожного окремого регіону, обґрунтовано критерії оцінки ефективності функціонування регіональних мереж закладів вищох освіти в умовах конкуренції.

Ключові слова: заклад вищої освіти, регіон, ефективність

INTRODUCTION

The patterns of development of higher education can be largely determined by the uneven level of development of the network of higher education institutions in different regions. [1]. Often, higher education institutions, in order to increase their competitiveness, decide to open a network of branches in the regions, but this decision is not always economically justified for the higher education institution. This is why it is of interest to evaluate the effectiveness of the network of higher education institutions in the current conditions of competition in the higher education market.

BASIC THEORETICAL AND PRACTICAL PROVISION

In the works focused on the analysis of the development of higher education in the USA, it is shown that the markets of public higher education are predominantly localized within the states

[2]. According to [3], many universities and colleges in the USA were created with the aim of raising the cultural status of new cities and states, as well as to promote their economic development. These are the reasons that led to the expansion of the offer of higher education and the formation of an extremely competitive organizational structure in higher education at the state level [3]. Koulumbe and Tremblay [4] analyzed the differences in the effects that educational systems have among 10 provinces in Canada and found that conducting intra-country, interregional studies is more informative than inter-country comparisons. Regions of one country satisfy the condition of "all other things being equal" to a greater extent than different countries, and therefore interregional analysis is less subject to various distortions. The presence of higher education institutions in the regions can significantly affect the indicators of the quality and efficiency of the provision of educational and research services [5,6].

The configuration and structure of the university network can affect not only the availability of educational services for the population, but also be associated with the substantive characteristics of scientific and educational activities. Thus, in the work [2] the performance of universities in the USA is analyzed depending on the structure of higher education markets in the states (the main characteristics are the number and scale of universities). For this purpose, the hypothesis was tested and confirmed that regional networks of higher education organizations with a large number of universities provide greater accessibility of educational services for the population.

The issues of the structure of educational organization networks are often analyzed through the prism of optimization of management and administrative processes. Brandt and Schubert [7] considered the hypothesis that large-scale universities can be characterized by the presence of a scale effect, allowing for the optimization of resources for administrative and management costs. However, from the point of view of issues of university adaptation to changing institutional conditions and demand in the education and research market, smaller universities are the most flexible [8], which actualizes the issue of analyzing the structure of regional networks of higher education organizations.

RESEARCH RESULTS AND THEIR EVALUATION

In the modern conditions of development of the higher education system, a new approach has emerged, within the framework of which universities should meet the needs of the new economy (increase of human capital of regions, scientific and innovative development and social mission) and demand of the population for education. Many studies indicate that the presence of universities leads to positive externalities, first of all, within one region or municipality. Thus, Rosenthal and Strange [9] found that innovative companies created with the participation of universities have a positive impact on economic development mainly at the local level. In the work [10], using the example of the USA, it is noted that the most positive effects of universities for the regional economy are manifested in small-scale regions, at a distance of up to 65 miles from the city where the university is located. In the work [11], already on the case of Sweden, a similar analysis is carried out, according to which, the presence of a university is associated with the productivity of workers in the labor market in a certain territory - with the greatest spatial effects manifested at a distance of up to 100 km. to the city where the university is located. In the work [12], using China as an example, it is also argued that the greatest positive effects from the activities of universities are typical for enterprises located near universities.

Summarizing the analysis of the spatial effects of the development of regional networks of higher education organizations, it is worth noting the "closed" nature of the educational migration of students, as well as low mobility in the academic labor market. At the same time, the conducted review of studies indicates that the main positive externalities from the presence of universities are localized within the cities and regions of their location, while an increase in the efficiency of

regional networks of higher education organizations also affects the growth of positive effects for the region.

The process of massification of education [13] and the expansion of the tertiary education sector have problematized the task of analyzing the efficiency of educational organizations and the entire education system as a whole. On the other hand, the spread of the discourse of efficiency is associated with a change in the models of management of educational systems as part of a broad process of modernization of public administration and the transition to the principles of New Public Management (NPM), aimed at increasing the efficiency of the public sector [14]. In management models built on the principles of NPM, universities are not subject to direct government control, but are included in the framework of regulation and monitoring, which involve tools for evaluating results, supporting leaders, stimulating competition, etc.

Efficiency can be interpreted and defined in different ways depending on the tasks set and the area of application of the results obtained. This approach affirms the model of multiple stakeholders [15], according to which different stakeholders define the concept of efficiency differently. A striking example of assessing the effectiveness of regional networks of higher education organizations is the American Measuring Up10 project, implemented by the National Center for Public Policy and Higher Education in the United States. The project is a ranking of networks of higher education organizations in the US states according to six indicators:

1. The level of student preparation for study at a university
2. The level of citizen participation in obtaining higher education
3. Accessibility of higher education for different categories of students
4. The rate of successful university completion (graduation on time)
5. Socioeconomic effects for the state
6. Success in mastering and applying knowledge and skills.

The results of the project stimulated the adoption of a fairly wide range of management decisions – from the launch of additional research in a number of US states on the development of public policy measures in the area of higher education development based on Measuring Up data [16], to decisions aimed at changing the features of higher education financing in individual states taking into account the results of the project. Moreover, the National Center for Public Policy and Higher Education in the US indicated that the priorities for the development of higher education in each specific state should be based on Measuring Up assessments relevant to the state, supplemented by data from federal statistical and information services, refined using the state's own information.

CONCLUSION

Thus, we analyze the concept of the effectiveness of regional networks of higher education organizations from the standpoint of public administration, identify the characteristics of the development of the educational system associated with the level of effectiveness, and develop recommendations to improve the effectiveness of regional networks of higher education organizations.

REFERENCES

1. Carnoy M., Froumin I., Leshukov O., Marginson S. Federalism and higher education: a comparative study, Sage Publishing, 2018
2. Koedel C. Higher education structure and education outcomes: evidence from the USA // Education Economics, 2014, Vol. 22 , Iss. 3

3. Stevens, Mitchell L. and Armstrong, Elizabeth A. and Arum, Richard, Sieve, Incubator, Temple, Hub: Empirical and Theoretical Advances in the Sociology of Higher Education // Annual Review of Sociology, 2008, Vol. 34
4. Coulombe S. & Tremblay J-F. "Skills, Education, And Canadian Provincial Disparity," // Journal of Regional Science, Wiley Blackwell, 2007, vol. 47(5), pages 965-991.
5. Richardson, Richard & Martinez, M. Policy and performance in American higher education: An examination of cases across state systems. Policy and Performance in American Higher Education: An Examination of Cases across State Systems. 2009, 1-264.
6. Richardson, R. C., K. Reeves-Bracco, P. M. Callan, and J. E. Finney. Designing state higher education systems for a new century. Phoenix, AZ: American Council on Education / Oryx Press, 1999
7. Brandt T., Schubert T. Is the university model an organizational necessity? Scale and agglomeration effects in science // Scientometrics, 2013, 94, 541–565.
8. Schubert T., Yang G. 'Institutional change and the optimal size of universities' // Scientometrics, 2016, vol 108, no. 3, pp. 1129-1153.
9. Rosenthal, S. S. and W. C. Strange "The Determinants of Agglomeration" // Journal of Urban Economics, 2001, 50, 191–229.
10. Goldstein, H., Drucker, J. The Economic Development Impacts of Universities on Regions: Do Size and Distance Matter? // Economic Development Quarterly, 2006, Vol. 20, No.1, p.22-43.
11. Andersson, R., Quigley, J., & Wilhelmson, M. University decentralization as regional policy: The Swedish experiment // Journal of Economic Geography, 2004, 4(4), 371-388.
12. Johnes J., Li Yu Measuring the research performance of Chinese higher education institutions using data envelopment analysis, China Economic Review, 2008
13. Guri-Rosenblit, S., Šebková, H.and Teichler, U. 'Massification and diversity of higher education systems: interplay of complex dimensions' // Higher Education Policy, 2007, 20 (4): 373–389.
14. Agasisti T., Catalano G. Governance models of university systems— towards quasi-markets? Tendencies and perspectives: A European comparison // Journal of Higher Education Policy and Management, 2006, Vol. 28, Iss. 3.
15. Connolly, T., Conlon, E., Deutsh, S. Organizational Effectiveness: A Multiple-Constituency Approach // Academy of Management Review, 1980, Vol. 5, pp. 211-217
16. Maddux R. A Study of the Value of "Measuring Up" as a Tool for State Policymakers in Developing Postsecondary Education Policy for Three Eastern States / Dissertation, VCU University Archives, 2007

POSSIBILITIES OF ASSESSING POPULATION MIGRATION USING GOOGLE TRENDS DATA

Reshetnyk Serhii
Candidate of pedagogical sciences,
associate professor of the department of pedagogy,
advanced training and postgraduate education,
Kyiv Agrarian University
National Academy of Agrarian Sciences of Ukraine
Andrii Martynovych
Metodist Centre of professional
(vocational and technical) education
Kyiv Agrarian University
National Academy of Agrarian Sciences of Ukraine

ABSTRACT

The article assesses the possibility of using digital technologies and information tools of the Internet to obtain information about population migration in the world. Positive and negative aspects of this method are defined.

Keywords: imigration, sources of information, statistics

АНОТАЦІЯ

У статті оцінено можливості використання цифрових технологій та інформаційних засобів мережі Інтернет для отримання інформації про міграцію населення у світі. Визначено позитивні та негативні сторони цього методу.

Ключові слова: міграція, джерела інформації, статистика

INTRODUCTION

There are many works in the literature aimed at studying both national and international migration. But to assess the level of migration, it is of great importance to obtain reliable information for research. In the current conditions of digital space development, this issue can be resolved using various information tools. Most researchers in different countries rely on official statistics, but they note some features and problems that arise when using data from national statistical services. The main ones include changes in the methodology for collecting migration statistics, imperfections in accounting methods, difficulties in accounting for migrants with dual citizenship, as well as illegal migration and delays in publishing data from statistical services. This is what determined the choice of the topic of the publication.

BASIC THEORETICAL AND PRACTICAL PROVISION

Due to significant delays in data publication and differences in calculation methodologies, researchers are increasingly turning to alternative data sources [1], which allow for migration estimates to be obtained, often before official statistics are released.

Such sources can be divided into two groups:
1) All kinds of surveys and statistical bulletins of non-governmental organizations;

2) Digital footprint data on the Internet, such as geolocation information, social media posts, or search history.

The first group of sources includes the Gallup World Poll (GWP18), which is conducted among adults in more than 130 countries. This survey includes more than 100 questions on education, health, income, and citizenship data [2]. The advantage of such data is that in addition to information on migration, other information about the migrant can also be found. Thus, in the work [3] using the GWP survey data, the relationship between migration and migrants' preferences, such as risk attitude, patience, and social preferences, is studied. The disadvantages of such a survey include the fact that statistical survey data are usually not freely available; in addition, such surveys have a small number of observations, as well as a low frequency of collected data. With the development of information technology and the emergence of "big data" on people's actions on the Internet, a new area of research has emerged related to the assessment of economic indicators using the digital footprint of economic agents [1].

The literature is developing studies using new types of exogenous data that help to speed up the receipt of migration estimates (sciencecasting), which can be divided into the following groups:
● GPS coordinates of mobile devices [4];
● Social network data [5];
● IP addresses of devices [6];
● Search query statistics [7];
● Other sources (flight data, news, etc.) [8].

RESEARCH RESULTS AND THEIR EVALUATION

In 2006, a service for presenting the dynamics of aggregated search queries appeared — Google Trends Index, allowing to receive information about search queries among users of different countries in real time. The appearance of such data opened up new opportunities for research in various fields (IT, communications, medicine, health care, business and economics). Despite the growing popularity of Google Trends Index, it is also worth noting a number of limitations and difficulties that researchers face when working with search queries. The main one is the unavailability of data on the absolute number of queries, since the data are relative in nature and are normalized to the maximum value in a time interval and a given region.

However, a solution to this problem can be preliminary standardization of data at the first stage of working with data. However, even this approach complicates the use of models in further forecasts due to the fact that when new data appears, the previous values of the series may change. This can happen when the next value of the series is greater than any of the previous ones: in this case, all the others will be retrospectively normalized to the new maximum value. Such a limitation imposes the need for constant re-evaluation of the model parameters when new data appears. Other limitations include the fact that the indices have a fairly high level of aggregation, since the data are available at the country level, and only in some cases is it possible to evaluate the data at the level of specific regions: in the case of a small number of requests in a region, the data will not be shown [9].

In addition, the GTI data do not contain any additional information about users, which does not allow for analysis using socio-demographic or any other segmentation of the population. Another important factor is the bias relative to Internet users in general (not all the population has access to or uses the Internet), and Google users relative to other search engines, in particular. And despite the fairly widespread use of the Google search network in the world, for some countries the statistics may be incomplete or absent altogether (for example, for China, where Google is not officially used). In addition, it is becoming important to study the linguistic characteristics of users

searching for information on Google: for example, residents of Syria will use different terms when searching for information on migration in English compared to residents of Canada, who are also searching for information on migration in English [9].

This means that when analyzing migration, it is necessary not only to translate the search queries under consideration into the official language of the migrant, but also to conduct research on real search phrases, as well as lexical features of language use in the countries under consideration [10]. Other disadvantages include the fact that an Internet search can only indirectly indicate a desire to migrate, but does not guarantee the fact of migration itself. At the same time, the works [11] note that migration intentions are still a good predictor of the fact of migration itself. However, the strength of such a predictor, firstly, depends on the country of the migrant; secondly, on the country of potential migration; and thirdly, on the selected search query. Thus, the work [12] notes that there are search queries, the popularity of which can grow due to exogenous factors relative to migration intentions, such as the general popularity of the topic in the media and society.

CONCLUSION

Thus, the conducted analysis of the use of various databases to obtain information on the level of migration and population movement in the world flow allows us to conclude that there are at least two alternative sources of information - official statistical data and those conducted by state and non-state organizations and information obtained from the Internet. We believe that the use of digital technologies can become the future for obtaining information in the direction of migration.

REFERENCES

1. Cesare N., Lee H., McCormick T., Spiro E., Zagheni E. (2018). Promises and Pitfalls of Using Digital Traces for Demographic Research. Demography. 55. DOI:10.1007/s13524-018-0715-2.
2. Deaton A. (2008). Income, Health, and Well-Being around the World: Evidence from the Gallup World Poll. The journal of economic perspectives: a journal of the American Economic Association. 22. 53-72. DOI:10.1257/jep.22.2.53.
3. Klöble K. (2021). A Behavioural Perspective on the Drivers of Migration: Studying Economic and Social Preferences Using the Gallup World Poll. 10.23661/dp4.2021.
4. Bengtsson L., Lu X., Thorson A., Garfield R., von Schreeb J. (2011). Improved Response to Disasters and Outbreaks by Tracking Population Movements with Mobile Phone Network Data: A Post-Earthquake Geospatial Study in Haiti. PLoS Medicine, 8 (8). DOI: 10.1371/journal.pmed.1001083
5. Kim J., Sîrbu A., Giannotti F., Gabrielli L. (2020). Digital Footprints of International Migration on Twitter (pp. 274–286). DOI: 10.1007/978-3-030-44584- 3_22.
6. Zagheni E., Weber I. (2012). You are where you E-mail: Using E-mail data to estimate international migration rates. Proceedings of the 3rd Annual ACM Web Science Conference, WebSci'12. DOI: 10.1145/2380718.2380764.
7. Jun S., Yoo H., Choi S. (2018). Ten years of research change using Google Trends: From the perspective of big data utilizations and applications. Technological forecasting and social change, 130, 69–87. DOI: 10.1016/j.techfore.2017.11.009.
8. Gabrielli L., Deutschmann E., Natale F., Recchi E., Vespe M. (2019). Dissecting global air traffic data to discern different types and trends of transnational human mobility. EPJ Data Science, 8(1), 26.
9. Tjaden J. (2021). Measuring migration 2.0: A review of digital data sources. Comparative Migration Studies, 9 (1), 59. DOI: 10.1186/s40878-021-00273-x.
10. Tjaden J., Arau A., Nuermaimaiti M., Cetin I., Acostamadiedo E., Rango M. (2021). Using "Big Data" to forecast migra- tion—A tale of high expectations, promising results and a long road ahead'. MEDIUM. Available at https://medium. com/@UNmigration/using-big-data-to-forecast-migration-8c8e64703559.
11. Van Dalen H., Henkens K. (2013). Explaining emigration intentions and behavior in the Netherlands, 2005–2010. Population Studies, 67(2), 225–241.
12. Böhme M., Gröger, A., Stöhr T. (2020). Searching for a better life: Predicting international migration with online search keywords. Journal of Development Economics, 142, 102347. DOI:10.1016/j.jdeveco.2019.04.002.

СТАВЛЕННЯ ДО УКРАЇНСЬКИХ БІЖЕНЦІВ В ЛЮКСЕМБУРЗІ: ЗДОБУТКИ ТА ПРОБЛЕМИ

Ірина Вітер, Україна,
кандидат економічних наук, старший науковий співробітник,
доцент, провідний науковий співробітник
Державної установи «Інститут всесвітньої історії НАН України»,
e-mail: irinaviter153@gmail.com

АНОТАЦІЯ

Мета роботи - дослідити проблеми і здобутки українських біженців в Люксембурзі, ставлення до них люксембуржців. Новизна роботи полягає у здійсненні комплексного аналізу проблеми зсередини - очима такого біженця. Показано, як змінилось ставлення до українців місцевого населення, визначено основні причини цих змін. Розкрито ставлення люксембуржців до участі у війні у Європі та своїй країні.

Ключові слова: Люксембург, російсько-українська війна, українські біженці

ABSTRACT

The purpose of the work is to investigate the problems and achievements of Ukrainian refugees in Luxembourg, the attitude of Luxembourgers towards them. The novelty of the work lies in carrying out a comprehensive analysis of the problem from the inside - through the eyes of such a refugee. It shows how the attitude of the local population towards Ukrainians has changed, and the main reasons for these changes are identified. The attitude of Luxembourgers towards participation in the war in Europe and their own country is revealed.

Keywords: Luxembourg, Russian-Ukrainian war, Ukrainian refugees

ВСТУП. INTRODUCTION

Сьогодні більшість європейців продовжують висловлювати підтримку українському народу. Це відбивається у різних аспектах, включаючи підтримку постачання зброї в Україну, захист прав українських біженців, а також виступ за членство України в ЄС. Отже тема статті є актуальною.

Метою статті є дослідження здобутків та проблем українських біженців в контексті ставлення до них у такій європейській країні, як Люксембург. Дослідження передбачає аналіз ситуації, а також визначення перспектив її розвитку. Основними методами дослідження виступають аналіз і синтез, історичний підхід та метод спостереження.

ОСНОВНІ ТЕОРЕТИЧНІ ТА ПРАКТИЧНІ ПОЛОЖЕННЯ. BASIC THEORETICAL AND PRACTICAL PROVISION

Коротка справка. Люксембург *(Велике Герцогство Люксембург)* – маленька за територією країна (близько 2586 км²), розташована в центрі Західної Європи, яка межує з Бельгією, Німеччиною та Францією. Загальна чисельність населення 473 тис. осіб. Основне населення країни – люксембуржці, які говорять люксембурзькою мовою; велику частку населення країни становлять іноземці – португальці, італійці, французи, німці та інші, що позначається на загальній ментальності населення. Культура країни, її населення

та мови сильно переплітаються з сусідами, що робить країну по суті сумішшю французької та німецької культур і що відображено у її офіційних мовах: люксембурзькій, французькій та німецькій.

Разом з Бельгією та Нідерландами Люксембург входить до Бенілюксу і є членом, більш того, – країною-засновницею Європейського Союзу, а столиця країни (Люксембург) є столицею ЄС. Все це зумовлює роль цієї країни у формуванні європейської політики.

Організація приймання українських біженців. Станом на 17 квітня 2025 р., згідно до УВКБ ООН, в Європі зафіксовано 6 357 600 біженців з України [10]. Не залишився в стороні і Люксембург. З перших днів російського вторгнення в Україну країна організовано приймала біженців, які скористалися спеціальним механізмом: тимчасовим захистом, запровадженим Радою Європейського Союзу 4 березня 2022 р. для врегулювання масового потоку переміщених осіб у країнах-членах.

Велике Герцогство швидко організувало пункти тимчасового розміщення та запустило програму інтеграції новоприбулих. Вже до середини березня кількість українців, які приїхали до Люксембургу, перевищила 2500 осіб. Очевидно, що перша хвиля іммігрантів та біженців припала на ранню весну, потім потік ослаб, але нові люди продовжували прибувати [4]. Загалом за весь 2022 р. до Люксембургу прибуло близько 5 тис. чол., майже всі вони отримали тимчасовий захист у країні [3].

В рамках Національної приймальні **(ONA)** в Люксембурзі було створено єдине вікно, яке об'єднує служби різних міністерств, поліції та пошти, щоб полегшити процедури для українських біженців. За два місяці, березень і квітень 2022 р., ONA прийняла до своїх структур розміщення більше людей, аніж за весь 2021 р.: станом на 30 квітня на об'єкти ONA направлено 2219 українців, які тікали від війни [2]. (у 2021 р. в ONA прийняли 2134 особи, які звернулися за міжнародним захистом). Більшість українських біженців було розселено саме через структури ONA, у 2022 р. до її мережі розміщення прибуло 3877 чол [4]. Частина українців знайшла прихисток у приймаючих родинах самостійно – через соціальні мережі або знайомих. Сотні люксембургських сімей прихистили українських біженців, не знаючи, як довго триватиме війна. ONA вітала ці приватні ініціативи.

Значну роль у допомозі українським біженцям відіграли благодійні організації, такі як **Червоний Хрест Люксембургу** та **Caritas**, які надавали українцям соціальне житло або допомагали їм знайти приймаючі родини Станом на жовтень 2023 р. через ці організації було розселено понад 1 300 осіб [8]. Червоний хрест Люксембургу у перші місяці війни зібрав понад 2 млн євро пожертвувань [3]. До кінця 2022 р. кількість українців, які отримали допомогу, перевищила населення самого Люксембургу. Включились у роботу і некомерційні організації. Найбільша та найвідоміша, **L'Ukraine,** викупила та направила в Україну 10 карет швидкої допомоги, а також зібрала 14 тис. євро на благодійному вечорі для підтримки українських підприємців [8].

Активісти Люксембургу організували мовні курси, розподілили дітей до шкіл та навіть випустили спеціальний розмовний українсько-люксембурзький словник. Словом року було обрано Ukrainkrich (*Українавійна*) [2]. Станом на лютий 2023 р. Міністерство освіти зареєструвало 1264 учнів-біженців у державних школах[1].

Тимчасовий захист, який спочатку встановлювався на один рік, був подовжений уже у 2023 р., а надалі – в 2024 та 2025 рр. Зараз діє четвертий документ про тимчасовий захист, який оформлено у вигляді пластикової ID-картки, що гарантує легальний статус українських громадян до 4 березня 2026 р. Оновлені процедури для 2025 р. передбачають розширення можливостей для отримання соціальних виплат, доступ до житлових послуг та навіть медичного страхування, що сприяє стабільності правового положення біженців [8]. Розмір соціальних виплат залишається незмінним. Однак гуманітарна допомога скорочується, і

проблема з пошуком житла все більше загострюється. Для її вирішення ONA постійно шукає нові можливості розміщення, зокрема з муніципалітетами.

Сьогодні Люксембург продовжує приймати українських біженців. Проте основна увага приділяється поглибленій інтеграції тих, хто вже знаходиться у країні, оптимізації процедур адаптації і підтримки, що оновлюються під сучасні потреби [3]. Для інтеграції та адаптації українських біженців в Люксембурзі були створені всі умови – проживання, право на роботу; на соціальну та медичну допомогу; право на навчання (у тому числі в університеті); безкоштовні інтеграційні мовні курси тощо.

Зазначимо, що українці досить непогано адаптувалися до нових умов, багато хто інтегрувався та знайшов роботу, самостійно винаймає житло. Наші співвітчизники беруть участь у багатьох активностях, які доступні їм у цій країні. Так, з подачі Університету Люксембургу науковці з України утворили об'єднання «Люксембурзька мережа українських дослідників LURN (Luxembourg Ukrainian Researcher Network)». Українці брали участь у проекті, проведеному в низці європейських країн (Люксембург, Польща, Україна), який має на меті зберегти унікальні спогади людей про минуле, – «Дослідження збору, збереження, аналізу та оприлюднення українських свідчень про війну» (U-CORE). Наші співвітчизники є членами Люксембургсько-Української торгової палати (The Luxembourg-Ukraine Chamber of Commerce, LUCC). Майже всі українські біженці навчаються на мовних курсах, відвідують спінінг-клаби, лекції та презентації. Завдяки спеціальній програмі мають можливість відвідувати музеї, театри, культурні, спортивні та мистецькі заходи за символічною ціною.

В той же час українці вболівають за Україну та все українське, слідкують за подіями в рідній країні, підтримують зв'язки з родичами, волонтерять, беруть участь у мітингах, протестах та гуманітарних акціях на підтримку України. Вони регулярно відвідують Український дім та є учасниками танцювальної та хорових студій, спільно відзначають українські свята, отже – старанно зберігають свою ідентичність.

Автор цієї статті також бере активну участь у соціальному та культурному житті Люксембургу, є членом LURN та LUCC, бере участь у проекті U-CORE, відвідує мовні курси та співає в українському хорі «Мальва».

Соціологічні опитування. Щоб краще уявити ставлення люксембуржців до війни в Україні та українців, наведемо дані соціологічних опитувань, проведених в Люксембурзі в різні роки. У перші місяці після початку повномасштабної війни в Україні ставлення жителів Люксембургу було досліджене в межах двох соціологічних опитувань. Перше з них, проведене компанією **TNS** на замовлення Luxemburger Wort і RTL у березні 2022 р[3], зафіксувало високий рівень емоційного залучення: 82% респондентів відчували, що війна в Україні їх безпосередньо стосується, 31% описали ситуацію як особисто важку, і лише 4% повністю не вбачали жодного зв'язку. Більшість люксембуржців (85%) вважали себе добре поінформованими про події, тоді як 86% категорично не сприймали російські аргументи щодо виправдання вторгнення. На фоні глибокої стурбованості можливими економічними та безпековими наслідками війни (89% очікували кризи в Європі, 68% боялися переростання конфлікту у світову війну) проявилася висока солідарність із Україною: 98% підтримували гуманітарну допомогу, 93% – прийом біженців, 58% – постачання зброї, і лише 16% були за військове втручання НАТО. Водночас більшість респондентів висловили підтримку санкціям проти Росії, схвалили дії ЄС (69%) та уряду Люксембургу (63%), але в стратегічних питаннях, як-от членство України в ЄС чи НАТО, настрої були стриманішими – лише 46%

---

[3] В опитуванні брали участь 503 особи різних вікових груп, різної статі, з різних регіонів проживання та професійної діяльності; тому опитування є репрезентативним.

159

підтримували вступ України до ЄС, 36% – до НАТО, і лише 37% погоджувались із військовою участю Люксембургу [6]. Друге дослідження – **Євробарометр** (травень 2022 року) – підтвердило ці настрої: 87% висловили симпатію до українців, 79% – особисту стурбованість війною. Питання європейської ідентичності українців розділило думки: 58% визнали їх частиною «європейської родини», а підтримка вступу України до ЄС зросла до 52%. Проте Люксембург залишався серед найменш схвальних країн у цьому питанні. Відповідальність за війну покладали на Росію лише 66% респондентів (проти 78% в середньому по ЄС), а фінансову допомогу, санкції та постачання зброї підтримували на рівні, нижчому за загальноєвропейські показники (відповідно 79%, 73% і 62%) [9].

У березні 2025 р. **Інститут ILRES** провів нове опитування [7], результати якого свідчать про зміну пріоритетів і глибші зрушення в громадській думці. Одним із найяскравіших показників стала втрата довіри до США: 80% люксембуржців більше не вважають Америку надійним партнером, тоді як лише 8% зберігають віру в її підтримку. Тим часом ставлення до України залишилося стабільно позитивним – 71% виступають за подальшу підтримку, з них 45% схвалюють як військову, так і фінансову допомогу. Цей показник зростає до 55% серед осіб віком понад 55 років. Водночас 20% опитаних виступають проти будь-якої допомоги, причому найбільша частка опонентів зафіксована серед людей віком 35-45 років (27%). Зростання відчуття загрози з боку Росії простежується чітко: 63% загалом побоюються потенційного нападу, при цьому найвищий рівень тривоги (73%) – серед молоді у віці 18-34 років. На цьому тлі більшість (73%) підтримують збільшення оборонного бюджету Люксембургу, знову ж таки з помітною підтримкою серед молоді (67%). Зросла й готовність до активнішої міжнародної участі: понад половина респондентів підтримали можливість відправки люксембурзьких військових до України в рамках миротворчої місії, особливо серед старшого населення (61%). Хоча третина респондентів усе ще проти будь-якої військової участі, загальний настрій став більш рішучим і стратегічно орієнтованим. Уряд Люксембургу, враховуючи громадську думку, планує до 2030 р. збільшити оборонні витрати до 2% ВНД (у 2025-му вони становлять 1,32%, або близько 800 млн євро). Окрім цього, останнім часом по телебаченню почала з'являтися реклама люксембурзької армії.

Таким чином, порівняння трьох опитувань показує, що в 2022 р. суспільство Люксембургу реагувало на війну в Україні з емоційним шоком, співпереживанням і великою гуманітарною підтримкою, проте залишалося обережним у питаннях військової участі та стратегічного зближення з Україною. У 2025 р. на тлі погіршення міжнародної безпеки, втрати довіри до США як гаранта стабільності та зростання тривожності щодо дій росії, громадська думка еволюціонувала до більш прагматичної й твердої підтримки оборонних рішень, зростання бюджету на безпеку та навіть потенційної участі в миротворчих ініціативах. Підтримка України залишається стабільною, однак тепер вона спирається не лише на солідарність, а й на усвідомлення геополітичних ризиків. Настрої люксембуржців змінилися від емоційного співпереживання до стратегічної мобілізації у відповідь на тривале протистояння в Європі.

РЕЗУЛЬТАТИ ДОСЛІДЖЕНЬ ТА ЇХ ОЦІНКА.
RESEARCH RESULTS AND THEIR EVALUATION

Ставлення населення до українських біженців. Від самого початку й до сьогодні ставлення населення Люксембургу до українців дуже добре й толерантне. Країна багатонаціональна й звикла до проявів інших культур. Через три офіційні мови та знання багатьма жителями англійської мовний бар'єр не відчувається так гостро, як в країнах з

однією титульною нацією та однією мовою. Це сприяє більш успішній адаптації українців.

В той же час можна помітити деякі негативні тенденції у ставленні до українських біженців. Певна частина мешканців невдоволена тим, що в умовах кризи держава більше допомагає біженцям, ніж самим громадянам. Але найбільші невдоволення проявляються, в першу чергу, у приймаючих сім'ях, в яких відчувається певна втома. На нашу думку, це можна пояснити низкою об'єктивних і суб'єктивних причин:

– **Затяжний характер війни.** Сотні сімей прихистили українських біженців, не знаючи, як довго триватиме війна. Коли приймаючі сім'ї селили українців у себе, передбачалося, що це на 3 місяці. Так, приймаючі сім'ї підписували контракт з Міністерством у справах сім'ї та інтеграції, який спочатку розповсюджувався на трьохмісячний період [5]. Люксембуржці просто втомилися від гостей в своїх оселях, у них змінилися плани.

– **Фінансові причини.** Економічне погіршення в Люксембурзі і в єврозоні взагалі триває з початку війни в Україні. Моральний дух домогосподарств впав до того ж рівня, що й на початку кризи, викликаної коронавірусом. Негативну роль зіграла, головним чином, значна інфляція, подорожчання всього і – головним чином – значне підвищення цін на комунальні послуги, які складають значну частку у витратах люксембуржців. Вище зазначений контракт передбачав, що «розміщення є актом солідарності в контексті гуманітарної кризи без фінансової компенсації». Але оскільки конфлікт затягується, приймаючим сім'ям стає все важче нести фінансовий тягар, пов'язаний із прийомом біженців. І хоч українці частково відшкодовують ці витрати, це не вирішує питання. Окрім цього сім'ї, які поселили в себе українців самостійно (не через благодійні організації), за три роки не отримали жодної фінансової допомоги від держави. А певна частина приймаючих сімей розраховувала саме на це.

– **Різниця в менталітетах.** При всій європейській орієнтованості українців відчувається значна різниця українського та люксембурзького менталітетів, що призводить до значних проблем у спільному проживанні. Це стосується розпорядку дня, годин приймання та приготування їжі на спільній кухні, виховання дітей тощо. Приймаючі сім'ї розраховували, що гості пристосуються до нових умов та будуть жити за новими правилами, але насправді цього не відбулося. Дратують місцевих жителів і часті поїздки наших земляків до України, з якої вони бігли. На жаль, мають місце випадки недостойної поведінки українців, що також негативно впливає на ставлення до всіх біженців.

Все це приводить до того, що українцям відмовляють у житлі, отож, вони мають шукати інші варіанти або повертатись в табір для біженців.

Від початку повномасштабної війни значна частина європейців, зокрема мешканців Люксембургу, сприймала події в Україні як локальний конфлікт і переважно реагувала на них із позицій гуманітарної солідарності. Однак результати опитувань 2022 р. показали високий рівень поінформованості, підтримки прийому біженців, гуманітарної допомоги та санкцій проти росії. Водночас підтримка постачання зброї й участі у військових операціях залишалася помірною. Уже в 2025 р. картина дещо змінилася: зросло усвідомлення загрози з боку росії, зокрема серед молоді, більшість респондентів висловлювали побоювання щодо можливого нападу на країни НАТО та виступали за збільшення оборонного бюджету. Рівень довіри до США як партнера суттєво впав, проте підтримка України в тій чи іншій формі залишається високою. Зросла й готовність обговорювати участь Люксембургу в миротворчих місіях. Усе це свідчить про поступову трансформацію суспільної свідомості – від емоційної підтримки до часткового усвідомлення спільної загрози. Водночас небажання до прямої участі у війні та страх ескалації свідчать, що європейці, хоча й визнають

геополітичні наслідки конфлікту, все ще не готові до кардинального перегляду власної безпекової стратегії.

ВИСНОВКИ. CONCLUSION

В умовах повномасштабного вторгнення російської федерації на територію України особливої актуальності набуває вивчення соціального стану українських громадян. З огляду на значну кількість українських біженців у країнах Європейського Союзу, значне місце в цій площині посідають питання їхньої адаптації та інтеграції в приймаючі суспільства. У зв'язку з цим виникає необхідність подальшого системного та поглибленого дослідження зазначених процесів. Водночас спостерігається трансформація ставлення європейських суспільств до проблеми вимушеної міграції українців – від початкової солідарності до більш прагматичного підходу, що також потребує наукового аналізу.

СПИСОК ВИКОРИСТАНОЇ ЛІТЕРАТУРИ. REFERENCES

1. Berthol T. Ukraine: le Luxembourg l'aide comme au premier jour. *Virgule*. 24.02.2023. URL: https://www.virgule.lu/luxembourg/le-luxembourg-continuera-a-soutenir-l-ukraine/1065985.html
2. Information for Ukrainians – Інформація для Українців. URL: https://emnluxembourg.uni.lu/ information-for-ukrainians/
3. Ministère de la Famille, des Solidarités, du Vivre ensemble et de l'Accueil (Люксембург). URL: https://mfsva.gouvernement.lu/fr/le-ministere/attributions/accueil/version-ukr-accueil-de-personnes.html
4. Mittelberger P. Le Luxembourg a tendu la main à 5.000 réfugiés ukrainiens. *Virgule*. 23.02.2023. URL: https://www.virgule.lu/luxembourg/le-luxembourg-a-tendu-la-main-a-5-000-refugies-ukrainiens/1066735.html?fbclid=IwAR0wF12t5zHzOwAZRMz0q42C2pW7W1vtyhukiNsHCkLjJvZPLVz1MOsPUaemAdVgGG4NUYxuLiiyrzdMwhcf9HOzzxEBMC7BsycfG7uTH_O3q O0ASiJDav4r2uHSg68
5. Montaigu G. Des familles d'accueil à bout de souffle. Le Quotidien. 15. 11.23. URL: https://lequotidien.lu/a-la-une/des-familles-daccueil-a-bout-de-souffle/?utm_medium=Social&utm_source=Face book&fbclid=IwAR2abJYYqukLWAgu9LtXy5irHL_ADZRt1NRyZLCPYlUiW_O88HdwVZX6Ws0_aem_Ad VfgxQyLM7DynRfgA5n9U33XL0p5S-cbUmJT81eaScgSGBCtSidLa3ebQpHuDolkV0#Echobox=1700029711
6. Mouzon M. La guerre en Ukraine pèse sur le moral des Luxembourgeois. *Virgule*. 16.03.2022. URL: https://www.virgule.lu/luxembourg/la-guerre-en-ukraine-pese-sur-le-moral-des-luxembourgeois/ 16578. html
7. Roberts D. Vast majority of Luxembourgers think USA is not a reliable partner. Luxembourg times. 12.03.25. URL: https://www.luxtimes.lu/luxembourg/vast-majority-of-luxembourgers-think-usa-is-not-a-reliable-partner/48421843.html
8. Visit Ukraine – Інформація для українців у Люксембурзі (2025) URL: https://visitukraine.today/uk/departure/luxembourg/ukraine-citizenship/temporary-protection
9. Wiss J. Adhésion de l'Ukraine à l'UE: les résidents plutôt réticents. L'essentiel. 5.05.2022. URL: https://www.lessentiel.lu/fr/story/adhesion-de-l-ukraine-a-l-ue-les-residents-plutot-reticents-666020567017
10. Агентство ООН у справах біженців. URL: https://data.unhcr.org/en/situations/ukraine

EKONOMIKA, FINANSES UN GRĀMATVEDĪBA

ECONOMICS, FINANCE AND ACCOUNTING

PRIVATE BANKING AND WEALTH MANAGEMENT: TRANSFORMATION IN CONTEXT OF INDUSTRIAL REVOLUTION 5.0

Alexey (Oleksii) Aleksandrov
Doctor of Sciences (Economics), MBA, EFA
Professor of Baltic International Academy (Riga, Latvia)
Professor of MIM – Kyiv Business School (Kyiv, Ukraine)
e-mail: alexey.aleksandrov@bsa.edu.lv
ORCID https://orcid.org/0009-0000-3482-2967

ABSTRACT

This article examines key trends in the development of the private banking and wealth management industry in the context of Industrial Revolution 5.0. It analyzes fundamental changes in customer preferences, the demographic shift in the distribution of global wealth, the growing importance of ESG investing, digitalization and technological innovation, and the integration of crypto assets into traditional banking services. Particular attention is paid to the phenomenon of the "Great Wealth Shift" and its impact on the transformation of the financial services industry. The article concludes with a discussion of the positive aspects and risks for the banking system associated with these changes. The study is based on current data from leading financial organizations, including UBS, Bank of America, PwC, EY, BCG and Capgemini.

Keywords: Private Banking, Wealth Management, ESG-investment, FinTech, digital banking, cryptoassets, Industrial Revolution 5.0, Human-Centric Transformation, Great Wealth Transfer, Hybrid advisory models and Hyperpersonalisation

O brave new world!
Aldous Huxley The "Brave New World" dystopian novel (1932) author

INTRODUCTION

The contemporary private banking and wealth management system finds itself at a pivotal juncture in its development. A constellation of fundamental factors—demographic shifts, technological innovations, evolving client preferences, and regulatory framework transformation—are reshaping the industry landscape. According to research carried out by UBS and Oxfam Group, approximately 2.5 billion individuals possess wealth of 10 000 USD and above, roughly 60 million of them hold capital exceeding 1 million USD. With the global population of 8.14 billion people as of December 2023, this creates a substantial market for private capital management services [2,3,4].

The ongoing changes in global wealth structure necessitate that financial institutions reconsider traditional models of engaging with High Net Worth Individuals (HNWI) and affluent clients. Within the framework of Industrial Revolution 5.0, characterised by the synthesis of cutting-edge digital technologies and human-centric approaches, banks and asset management companies face the imperative to transform their business models, product offerings, and client engagement channels.

This research aims to analyse the key trends shaping the future of the private banking and wealth management industry, with particular focus on the opportunities and challenges they present for financial institutions in the context of Industrial Revolution 5.0.

BASIC THEORETICAL AND PRACTICAL PROVISION

At the outset of the current decade (from 2020), the first references to the commencement of "Industrial Revolution 5.0" emerged, whose principal distinction lies in a paradigmatic shift: from technology for the sake of further technological development to technology for humanity and the planet. Whilst Industry 4.0 sought to replace human involvement with technological solutions wherever feasible (digitalisation and automation of existing processes), Industry 5.0 is geared towards creating synergy between human capabilities and burgeoning technological possibilities (harmonious integration of technological processes with human needs and environmental sustainability).

The European Commission report "Industry 5.0: Towards a sustainable, human-centric and resilient European industry" highlights three key characteristics [1]:

1. Human-centricity - industry must serve people, rather than the vice verse. This encompasses improving working conditions, developing employee skills, and creating jobs that complement human capabilities with technology.

2. Sustainability - industrial production must operate within planetary boundaries, utilise circular business models, and strive towards carbon neutrality.

3. Resilience - the capacity to adapt to crises and unexpected changes, as demonstrated by the COVID-19 pandemic.

The comparative characteristics of Industrial Revolution 5.0 via Industry 4.0 are presented in table 1 form:

Table 1

Comparative Characteristics of Industrial Revolution 4.0 vs Industrial Revolution 5.0

Characteristic	Industrial Revolution 4.0	Industrial Revolution 5.0
Timeframe	2010s – present	2020s – future
Core Concept	Digitalisation and production automation	Human-centric production with sustainable development
Key Technologies	IoT, AI, big data, cloud computing, robotics, 3D printing, blockchain	Collaborative robotics (cobots), augmented AI, biotechnology, quantum computing, neural interfaces
Focus	Efficiency, automation, system connectivity	Sustainability, personalisation, human wellbeing
Human Role	Partial human replacement by machines	Human-machine collaboration, augmentation of human capabilities
Production Goals	Mass production, process optimisation	Customised production, circular economy
Environmental Aspect	Energy efficiency as by-product	Sustainable development as main goal
Social Direction	Technological progress	Addressing social problems and improving quality of life
Human-Machine Interaction	Humans operate smart machines	Human-machine symbiosis
Production Model	Smart factories, digital twins	Adaptive, flexible production ecosystems
Innovation Approach	Technological innovations	Socio-technological innovations

Data Management	Big data collection and analysis	Ethical data usage considering privacy
Personalisation	Mass customisation	Complete product and service personalisation
Economic Model	Digital economy	Sharing and sustainability economy
Skills of Experts	Digital and technical competencies	Creativity, emotional intelligence, systems thinking

Source: Author's development based on European Commission report "Industry 5.0: Towards a sustainable, human-centric and resilient European industry" (2021)

Thus, Industry 5.0 does not replace Industry 4.0 but rather represents a complementary development, bringing forth new values. European industry, including financial services, must become leaders not only in technologies but also in humanistic approaches to their application.

Why is analysing developments within Industry 5.0 through the perspective of HNWI so crucial? Representatives of this client segment constitute not only the most financially powerful segment (in terms of wealth volume) but consequently wield considerable political influence. Indeed, young representatives (Generations Y and Z) exerted the most substantial influence on developing the ESG Investment trend. Essentially, they compelled the conservative banking environment to acknowledge their opinions and preferences during 2025-2028, when this trend began its rapid development [5].

The contemporary global wealth distribution landscape is characterised by high capital concentration. According to data presented in research by UBS and Oxfam Group, wealth distribution appears as follows [2,3]:

Table 2

Global Wealth Distribution

Wealth Range	Number of Adults (% of World Adults)	Total Wealth (% of World)
< USD 10,000	2.818 billion (52.5%)	USD 5.3 trillion (1.2%)
USD 10,000 to 100,000	1.844 billion (34.4%)	USD 61.9 trillion (13.6%)
USD 100,000 to 1 million	642 million (12%)	USD 178.9 trillion (39.4%)
> USD 1 million	59.4 million (1.1%)	USD 208.3 trillion (45.8%)

Source: Credit Suisse AG, a UBS Group company Global Wealth Report – 2023

Of particular interest to the private banking industry is the affluent client segment with wealth exceeding USD 1 million, detailed in Table 3 [2,3].

Table 3:

Wealth Distribution: TOP Segment

Wealth Range	Number of Adults
USD 1 million to 5 million	51.5 million
USD 5 million to 10 million	5,087,930
USD 10 million to 50 million	2,510,320
> USD 50 million	243,060

Source: Credit Suisse AG, a UBS Group company Global Wealth Report – 2023

The coming decades are expected to witness the largest intergenerational wealth redistribution in history, termed the "Great Wealth Transfer". According to Bank of America Private Bank's "Study of Wealthy Americans", approximately USD 124 trillion in assets will transfer to new owners by 2048 [5].

166

The primary beneficiaries will be Generation X representatives (born between 1965 and 1980), Millennials (1981-1996), and Generation Z (born after 1997), and the part of wealth will be transferred to philanthropy.

Critically important for the financial industry is the fact that 80% of new capital owners change financial advisors after receiving inheritance, creating a serious challenge for traditional private banking models and highlighting the necessity for proactive adaptation to changing client needs.

Generations X, Y (Millennials), and Z demonstrate substantial differences in their financial preferences and expectations from financial institution interactions compared to previous generations. According to Bank of America Private Bank's "Study of Wealthy Americans", these differences include:

1. Heigh attention to sustainable development, social impact, and digital assets

2. Expectation of more flexible, transparent, and personalized financial solutions

3. Interest in alternative investments, including digital assets and ESG products

ESG investing (Environmental, Social, Governance) assumes particular significance for new generations. Capgemini World Wealth Report research demonstrates that [6]:

1. Nearly every second client (46%) considers ESG and sustainable investment consulting important

2. Millennials two times more often than Generation X or Boomers select wealth managers based on sustainable investment offerings

3. In response, asset management companies are integrating ESG criteria into planning strategies, investment management, benchmarks, and reporting across all asset classes

Despite these achievements, the average satisfaction level with ESG investment results stands at merely 36%, indicating the need for further refinement of these products and implementation approaches.

ESG investing has evolved into a significant global trend with uneven geographical distribution. According to research data, the global ESG investment market appears as follows (Table 4) [6,7]:

Table 4:

ESG Funds, Regional Distribution

Region	Assets Under Management (USD billion)	Global Market Share (%)
European Union	2,293	84
USA	299	11
Asia (excluding Japan)	67	2
Australia/New Zealand	31	1
Japan	23	1
Canada	31	1

Source: Morningstar Direct Manager Research 2023 [15]

The global ESG investment market was valued at USD 25.1 trillion in 2023 and is projected to grow to USD 79.7 trillion by 2030 at a compound annual growth rate (CAGR) of 18.8% [16].

Institutional ESG investments are expected to reach USD 33.9 trillion by 2026. By 2024, 90% of S&P 500 companies and 70% of Russell 1000 companies published ESG reports [17].

However, unfortunately, contrary trends are also observable. In 2025, several banks, including major financial institutions from North America, Japan, and Australia, withdrew from

the Net-Zero Banking Alliance (NZBA), leading to a 22% reduction in the alliance's total assets. Companies such as BP scaled back their emission reduction targets, reflecting a broader tendency to reconsider ESG commitments amid economic and geopolitical challenges [18].

The reasons are standard and have been repeatedly emphasized by specialists:

1. **Changing Political Landscape:** In the USA, with the new President and administration, mounting political resistance to ESG initiatives has emerged, leading to reduced support for ESG proposals from major investment companies such as BlackRock and Vanguard. The EU has also experienced regulatory environment changes (corporate ESG reporting requirements).

2. **Absence of unified legislative framework and standardization:** The lack of unified ESG assessment standards hampers company comparisons and may facilitate manipulation of ESG rating indicators.

3. **Greenwashing remains a serious problem in the ESG sphere:**

a) According to RepRisk data, registered greenwashing cases decreased by 12% from June 2023 to June 2024 compared to the previous year, marking the first decline in 6 years

b) Despite the overall reduction in incident numbers, their severity has increased. For instance, in the banking sector during 2022-2023, climate-related greenwashing cases rose by 70%, followed by a 20% decline in 2024

c) Approximately 30% of companies accused of greenwashing in 2023 were accused again in 2024, indicating the systemic nature of the problem

d) In 2025, DWS Group was fined 25 million euros for greenwashing—the largest fine in the financial industry for ESG violations

e) In 2024, the European Union adopted the Green Claims Directive, requiring companies to provide credible evidence for their environmental claims, aimed at combating greenwashing

f) Regulatory bodies such as the European Securities and Markets Authority (ESMA) are intensifying oversight of ESG terminology usage in fund names and demanding greater transparency in reporting

The trend introduced by Industry 4.0—business digitalization—continues under Industry 5.0 with further banking business digitalization development (now based on quantum computing), but through the perspective of Human-Centric Transformation. This represents a strategic approach whereby [1]:

1. Technology's purpose is to improve people's lives, not merely increase productivity

2. Emotional, cognitive, cultural, and ethical aspects are integrated into product and service development

3. The client is not a management object but an active solution co-creator (co-creation)

4. Human diversity and uniqueness are considered—age, gender, culture, worldview, needs

5. Empathy, hyperpersonalisation, and inclusion technologies are applied

For the Private Banking & Wealth Management industry, this literally means that technology should serve not wealth maximization at any cost, but the client's long-term and meaningful wellbeing as an individual. These aspects can be presented in greater detail in tabular form:

Table 5

Human-Centric Transformation in Private Banking & Wealth Management Context

Aspect	Human-Centric Transformation Manifestation
Client Understanding	Utilizing AI and behavioural analytics to understand not only financial goals but also client motivations, values, and concerns

Partnership, not Paternalisme	Moving away from "we know better where to invest your money" to collaborative thinking: advisor + client as a team
Hyperpersonnalisation	Investment strategies considering ESG priorities, life stages, career/family plans
Ethics and Trust	Algorithm transparency, refusing data manipulation, prioritizing privacy
Financial Wellbeing	Integrating wellness approaches—balancing wealth, time, health, and purpose
Accessibility and Inclusivity	Expanding services to HENRY clients, women investors, clients with alternative career trajectories
Digital Identity	Client control over their data and digital persona (Self-Sovereign Identity)

Source: Author's development

Digital transformation has become a priority for Private Banking, encompassing the following key directions [13,14]:

1. Implementing hybrid advisory models combining digital platforms and personal service

2. Utilizing artificial intelligence and data analytics to create hyperpersonalised offerings

3. Collaborating with fintech companies to accelerate digital initiatives

4. Strengthening digital trust through cybersecurity and data protection investments

5. Developing agile culture in a rapidly changing digital landscape (distributed ledger technologies, cloud technologies, APIs, artificial intelligence, decentralised finance, central bank digital currencies, embedded finance, BNPL, etc.)

6. Evolving regulatory framework influencing further technology implementation

These measures enable banks to enhance client experience and increase operational efficiency. Artificial intelligence is transforming asset and wealth management. According to PwC Global AWM & ESG Research Centre research, robo-advisor assets under management will double in the coming years from USD 2.5 trillion in 2022 to USD 5.9 trillion by end-2027, demonstrating growing penetration of automated solutions in the wealth management industry [8,10].

In the contemporary HNWI's journey map via WealthTech (presentable as subsequent service execution points), the entire process can now be completed without human intervention:

1. Digital customer acquisition

2. Automated client onboarding and screening

3. Portfolio allocation

4. Execution and trading advice

5. Portfolio management

6. Automated client reporting

Previously, this was impossible; moreover, executing each designated functional activity required several specialists or team participation.

When analyzing Private Banking & Wealth Management industry digitalisation, one cannot overlook the development of a new asset class: crypto assets, which gained momentum within Industry 4.0 and 5.0 transformations.

Interest in digital assets is growing amongst affluent clients:

1. Approximately 92% of investors are prepared to consider cryptocurrency investments provided they are offered by traditional financial institutions [5].

2. 38% are ready to invest if the product is offered through their private bank [11,12].

3. Young investors (21-43 years) actively diversify their portfolios, including cryptocurrencies: roughly 49% already own crypto assets, whilst another 38% are interested in acquiring them [9].

4. Banks are beginning to offer digital asset management services, including custody and consultancy

5. Regulatory framework development, such as MiCA in the EU, facilitates digital asset legitimization

New financial instruments for cryptocurrency investment are emerging in the market, such as exchange-traded funds (ETFs), providing investors with access to crypto assets through traditional investment channels.

Table 6

Cryptocurrency Investment Funds

Type	ETF Name	ETF Description
Bitcoin Investment Funds	iShares Bitcoin Trust (IBIT)	BlackRock Investment Company's spot Bitcoin ETF, which has become the world's largest, surpassing Grayscale's Bitcoin Trust. AuM approximately USD 19.5 billion. Provides investors with direct Bitcoin exposure without requiring direct ownership.
	Grayscale Bitcoin Trust (GBTC)	Established in 2013, GBTC is one of the earliest publicly traded Bitcoin investment vehicles in the USA, allowing investors to gain Bitcoin exposure without direct ownership. AuM approximately USD 20.5 billion.
	Fidelity Wise Origin Bitcoin Fund (FBTC)	Launched in January 2024, FBTC is an exchange-traded product (ETP) designed to track Bitcoin performance, providing investors with a straightforward method to gain Bitcoin exposure through traditional brokerage accounts. AuM approximately USD 18.7 billion.
Ethereum Investment Funds	Grayscale Ethereum Trust (ETHE)	Introduced in 2017, ETHE provides investors with Ethereum (ETH) exposure through a trust structure, eliminating the need for direct cryptocurrency purchase and custody. AuM approximately USD 5.25 billion.
	iShares Ethereum Trust (ETHA)	Managed by BlackRock Investment Company, ETHA offers investors exposure to Ethereum's native token, ether, within a traditional brokerage account, simplifying the investment process. AuM approximately USD 2.13 billion.
	Fidelity Ethereum Fund (FETH)	Launched in July 2024, FETH is one of the industry's first spot exchange-traded products (ETPs) seeking to track ether performance, offering investors direct exposure through a regulated investment vehicle. AuM approximately USD 811 million.

Source: Author's development

Asset tokenization is also becoming an important trend, enabling enhanced liquidity for traditionally illiquid assets such as real estate and private investments, whilst expanding investment access for broader audiences.

Projections suggest tokenized investment fund volumes will grow from USD 40 billion in 2023 to over USD 317 billion by 2028. Thus, cryptocurrencies are gradually integrating into traditional banking services.

CONCLUSION

The conducted analysis reveals several positive developments and risks for the banking system (Private Banking & Wealth Management industry) within Industrial Revolution 5.0 transformations.

1. Technological bank transformation opens opportunities for substantial operational efficiency improvements, cost reductions, and new revenue stream creation. Artificial intelligence, cloud computing, blockchain, and other advanced technologies enable routine process automation, enhanced data analytics, and innovative client product offerings. Industry 5.0 emphasizes Human-Centric Transformation, allowing digital solutions to unite under the formula: "not wealth maximization at any cost, but the client's long-term and meaningful wellbeing as an individual."

2. Hybrid advisory models combining digital platforms and personal service enable banks to engage more effectively with various client segments, particularly new generation representatives preferring digital communication channels. Quantum analysis capabilities may bring significant prospects, wherein all combinations are analyzed simultaneously rather than sequential best-option selection. Implementing such capabilities in investment consultancy will represent another revolutionary moment within Industry 5.0.

3. ESG investing provides banks with strategic opportunities for product offering diversification and attracting clients interested in sustainable development. ESG investment market growth (projected 18.8% CAGR until 2030) creates substantial potential for fee-based product revenue increases [10].

4. Crypto asset and traditional financial service integration opens new market niches and opportunities for attracting technologically-oriented clients. Regulated instrument emergence, such as bitcoin ETFs, reduces risks and simplifies traditional financial institution operations with digital assets.

5. "Great Wealth Transfer" (USD 124 trillion until 2048) creates unprecedented opportunities for banks capable of adapting to new generation capital owner preferences, expanding client bases, and increasing assets under management [3,12].

All mentioned parameters fully correspond to designated development target directions specified in the 2021 European Commission research: Human-centricity, Sustainability, and Resilience.

Based on the results of the research, possible risks could include:

1. High-speed technological changes require substantial bank investments in IT infrastructure and human capital. Financial institutions unable to adapt to digital transformation risk losing clients and market positions.

2. Competition from fintech companies and tech giants offering innovative financial solutions with superior user experiences and often lower prices threatens traditional banking business models.

3. Client generational shifts create risks of massive capital outflow from traditional banks, considering that 80% of new capital owners change financial advisors after receiving inheritance. Banks must proactively build relationships with new wealth owners (inheritors) [5,9].

4. Regulatory environment complexity, particularly regarding Compliance & AML control, crypto assets, and data protection, creates additional regulatory burden on banks and heightens non-compliance risks.

5. Greenwashing problems and insufficient ESG investing standardization create reputational risks for banks and may lead to substantial fines, consequently creating investor risks.

6. Cybersecurity becomes a critical factor in the ubiquitous digitalisation era. Data breaches and cybercrimes may inflict substantial financial and reputational damage on banks.

7.   Crypto asset volatility and integration risks into traditional financial services require banks to develop comprehensive risk management systems and maintain balance between innovation and security.

Industrial Revolution 5.0 is transforming the private banking and wealth management industry, simultaneously creating unprecedented growth opportunities and significant challenges for existing business models. Successful adaptation to these changes requires strategic vision, innovation readiness, and client-oriented approaches considering new generation capital owner preference changes.

REFERENCES

1.   European Commission report (2021) Industry 5.0: Towards a sustainable, human-centric and resilient European industry. Retrieved from: https://research-and-innovation.ec.europa.eu/knowledge-publications-tools-and-data
2.   UBS Global Wealth Report (2023) Retrieved from: www.ubs.com/us/en/wealth-management/insights/global-wealth-report.html
3.   UBS Global Wealth Report (2024) Retrieved from: www.ubs.com/us/en/wealth-management/insights/global-wealth-report.html
4.   Oxfam Group Report (2023) Retrieved from: www.oxfam.org.uk
5.   Bank of America Private Bank's (2024) Study of Wealthy Americans Retrieved from: https://ustrustaem.fs.ml.com/content/dam/ust/articles/pdf/2024BoA-PB_Study_of_Wealthy_Americans.pdf
6.   Capgemini World Wealth Report (2023) Retrieved from: www.capgemini.com/insights/research-library/world-wealth-report-2023/
7.   Capgemini World Wealth Report (2024) Retrieved from: www.capgemini.com/insights/research-library/world-wealth-report/
8.   PwC Global AWM & ESG Research Centre (2023) Retrieved from: www.pwc.lu/en/market-research-centre.html
9.   European Commission, The Silver Economy (2018) Retrieved from: https://op.europa.eu/en/publication-detail
10. European Securities and Markets Authority (ESMA), ESG Reporting Standards (2024). Retrieved from: www.esma.europa.eu/esmas-activities/sustainable-finance/sustainability-reporting
11. Deloitte Digital Banking Maturity Study (2023). Retrieved from: www.deloitte.com/fr/fr/Industries/banking-capital-markets/research/digital-banking-maturity.html
12. Deloitte Digital Banking Maturity Study (2024). Retrieved from: www.deloitte.com/fr/fr/Industries/banking-capital-markets/research/digital-banking-maturity.html
13. BIS Innovation Hub, CBDC and Tokenization Report (2024). Retrieved from: www.bis.org/about/bisih/topics/cbdc.htm
14. World Economic Forum, Future of Financial Services (2024). Retrieved from: www3.weforum.org/docs/WEF_The_Future_of_Financial_Advice_2024.pdf
15. Joselzn Lovene Morningstar (2023) Les fonds durables mondiaux tires par l'Europe. Retrieved from: www.morningstar.fr
16. ESG Investing Market Size (2023) Retrieved from: www.grandviewresearch.com/industry-analysis/esg-investing-market-report
17. PwC Asset and wealth management revolution. Exponential expectations for ESG (2022). Retrieved from: www.pwc.com/gx/en/industries/financial-services/asset-management/publications
18. Mike Scott ESG Watch: Watered-down climate targets by banks 'a sign of the times'(2025) Retrieved from: www.reuters.com/sustainability/sustainable-finance-reporting

LATVIJAS REPUBLIKAS VID NODOKĻU MAKSĀTĀJU REITINGA SISTĒMA KĀ UZŅĒMUMA REPUTĀCIJAS SABIEDROTĀJS

Anita Gailite
Latvia
The College of Accountancy and Finance, Riga
Study programme: Accounting and Finance
Email: issumbosi@inbox.lv
Research advisor: Angelina Tjurina
Mag. Sc. Oec, GFK docente

ANOTĀCIJA

Latvijas Republikas Valsts ieņēmumu dienesta izstrādātā Nodokļu maksātāju reitinga sistēma ir jauns rīks, kas paredzēts nodokļu disciplīnas veicināšanai un uzņēmējdarbības vides uzlabošanai. Pētījuma mērķis ir izvērtēt šīs sistēmas ietekmi uz uzņēmumu reputāciju kā uzticamības rādītāju uzņēmējdarbības praksē. Izmantojot kvalitatīvās pētniecības metodes, analizēta uzņēmumu, grāmatvežu un sadarbības partneru attieksme pret reitinga sistēmu. Pētījumā atklāts, ka, lai arī rīks var kalpot kā reputācijas un uzticības indikators, tā praktiskā izmantošana vēl ir ierobežota interpretācijas grūtību dēļ.

Atslēgvārdi: likumdošana, nodokļi, pētījums, reitings, VID

ABSTRACT

Taxpayer Rating System developed by the State Revenue Service of the Republic of Latvia is a new tool aimed at promoting tax discipline and improving the business environment. The objective of the research is to assess the impact of this system on company reputation as an indicator of trustworthiness in business practice. Using qualitative research methods, the study analyses the attitudes of companies, accountants, and cooperation partners towards the rating system. The study reveals that although the tool can serve as an indicator of reputation and trustworthiness, its practical application is still limited due to difficulties in interpretation.

Keywords: legislation, rating, research, SRS, taxes

IEVADS. INTRODUCTION

Kā darba pētāmā problēma ir izvirzīta Latvijas Republikas Valsts Ieņēmumu Dienesta (turpmāk – VID) nodokļu maksātāju reitinga sistēmas un tās novērtējuma nozīmes noteikšana uzņēmuma reputācijas stiprināšanā. Problēmas aktualitāti nosaka fakts, ka attiecīgais rīks ir salīdzinoši jauns, un tā praktiskā pielietošana, kā arī sabiedrībās izpratne par to vēl tikai veidojas.

Pētījuma mērķis ir izvērtēt Latvijas Republikas VID izstrādātās un pilnveidotās Nodokļu maksātāju reitinga sistēmas ietekmi uz uzņēmumu reputāciju un tās potenciālu kā uzticamības rādītāju uzņēmējdarbības praksē. Izmantojot kvalitatīvās pētniecības metodes – dokumentu analīzi un aptaujas –, autore analizē uzņēmumu, grāmatvežu un sadarbības partneru attieksmi pret reitinga sistēmu, izvērtē iegūtos rezultātus, formulē secinājumus un izstrādā ieteikumus.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

Nodokļu maksātāja reitings ir VID veidots vērtējums par uzņēmuma nodokļu saistību izpildi [8]. Reitinga mērķis ir informēt nodokļu maksātāju, kāda ir viņa nodokļu maksāšanas disciplīna, motivēt uzlabot nodokļu samaksas disciplīnu, ka arī atbalstīt uzņēmumus ar rīku, kuru izmantojot,

173

tie var prezentēt savu reputāciju, tai skaitā biznesa partneriem [15]. VID uzsver, ka šis rīks dod iespēju pasargāt godīgos uzņēmējus no neapzināti kļūmīgu biznesa sakaru dibināšanas [14].

Reitinga subjekti ir visas juridiskās personas, kuru darbības mērķis ir gūt peļņu. Novērtējums tiek nodrošināts visām komercsabiedrībām, ārvalstu uzņēmumu filiālēm, ES dalībvalstu, Islandes, Norvēģijas un Lihtenšteinas kapitālsabiedrības filiālēm, ka arī zemnieku, zvejnieku saimniecībām un individuālajiem uzņēmumiem, ja tie iesniedz gada pārskatu [15]. Ikviens uzņēmums, kuram ir veikts novērtējums, var ar to iepazīties savā elektroniskās deklarēšanas sistēmas profilā [10], (turpmāk – EDS), (sk. 1.attēlu).


1.attēls. **VID EDS darba virsma**

(autores veidots, VID EDS, 23.04.2025)

Reitinga kopējais novērtējums ir katra konkrētā uzņēmuma reitinga burts. Reitinga subjekti var saņemt vienu no pieciem reitinga līmeņiem [6,2,3]. **A līmeni** kopā ar vairākām priekšrocībām nodokļu un muitas jomā saņem tie nodokļu maksātāji, kuri laicīgi pilda savas nodokļu saistības. **B līmeni** piešķir, ja uzņēmums kopumā pilda savas saistības ar valsti, tomēr te ir vieta uzlabojumiem. **C līmeni** saņem tie nodokļu maksātāji, kam ir būtiski pārkāpumi nodokļu saistību izpildē. **N līmenī** atrodas neaktīvie nodokļu maksātāji. **J līmenī** ir iekļauti pēdējo sešu mēnešu laikā reģistrētie nodokļu maksātāji.

Lai sniegtu nodokļu maksātājiem iespēju apliecināt savu reputāciju sadarbības partneru priekšā, VID ir paredzējis iespēju sagatavot trīs dažāda satura izziņas ar reitingu. Izziņu iespējams saņemt un nosūtīt e-pastā vai caur EDS profilu, ja arī saņēmējs ir reģistrēts EDS lietotājs [13].

Pētījuma gaitā autore konstatēja, ka VID savā mājaslapā nodrošina reitinga subjektu novērtējumu datu vizualizāciju [9] (skat. 2. attēlu). Šie dati nav reāllaika atzinums, jo rādītāji tiek novērtēti par noteiktu laika periodu pagātnē – no sešiem mēnešiem līdz trim gadiem. Reitings tiek pārskatīts vismaz četras reizes gadā [8].
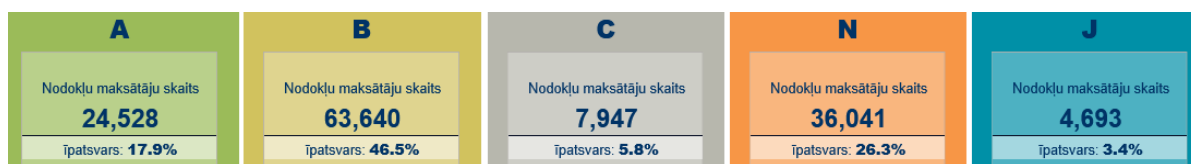
2.attēls. **Nodokļu maksātāju, kuriem noteikts reitings, skaits uz 1.03.2025**

(autores veidots, VID tīmekļvietne, 23.04.2025)

Publicētie dati norāda, ka aptuveni vien piektā daļa uzņēmumu (17.9%) ir saņēmuši augstāko novērtējumu. Šis fakts var liecināt par salīdzinoši augstiem kritērijiem, lai atbilstu visiem   A

līmeņa nosacījumiem. B līmeņa grupa veido vislielāko īpatsvaru (46.5%). Tas nozīmē, ka gandrīz puse uzņēmumu tikai daļēji atbilst augstākā reitinga kritērijiem. Lai gan reitinga līmenī C novērtēti vien 5,8% no kopējā reitinga subjektu skaita, tomēr tie pārstāv augstāku riska grupu, jo šādu uzņēmumu spēja pildīt savas saistības ir vērtējama kritiski. Apmēram ceturtdaļai uzņēmumu ir piešķirts N līmenis, norādot uz to, ka šie nodokļu maksātāji neveic aktīvu saimniecisko darbību. Visbeidzot, 3,4% uzņēmumu ir klasificēti J līmenī. Šie nodokļu maksātāji ir reģistrējuši uzņēmumu pēdējo sešu mēnešu laikā un drīz varēs pierādīt sevi ar rezultātiem.

Lai sniegtu uzņēmumam izpratni par jomām, kurās VID saskata riskus, iestāde, nosakot reitingu, izmanto sešas nodokļu saistību izpildi raksturojošo rādītāju kopas [4] (sk. 3.attēlu). Kopām tiek pielietoti trīs krāsu apzīmējumi, norādot uz rezultātiem nodokļu nomaksas jomā: **zaļš** - saistības ir izpildītas, **dzeltens** - ir jāparedz uzlabojumi un **sarkans -** kritiskiem rādītājiem.


3.attēls. **Nodokļu saistību izpildi raksturojošo rādītāju kopas**

(autores veidots, VID EDS, 23.04.2025)

Pētījuma gaitā autore iepazinās arī citu Baltijas valstu, proti, Lietuvas un Igaunijas, pieredzi nodokļu maksātāju novērtēšanā, lai iegūtu priekšstatu par pieejas atšķirībām kaimiņvalstīs. Autore konstatēja, ka Lietuvā pašlaik nav ieviesta nodokļu maksātāju reitinga sistēma līdzīgi kā Latvijā [11, 12], savukārt Igaunijas nodokļu un muitas pārvalde (ETCB) [5] nodokļu uzvedības reitinga e-pakalpojumu ieviesa valsts līmenī 2020. gada jūnijā [1]. Pamata rādītāji, kas tiek ņemti vērā reitinga noteikšanā, ir pašu uzņēmumu brīvprātīgi iesniegtie dati un nodokļu administrācijas rīcībā esošā informācija. Sistēma darbojas kā kontroles mehānisms, izmantojot 'luksofora' indikatorus: sarkanā krāsa norāda uz būtiskiem trūkumiem, dzeltenā – uz atsevišķiem trūkumiem, savukārt zaļā uz brīvprātīgi iesniegtās nodokļu informācijas pilnīgu atbilstību likuma prasībām. Pirms deklarāciju iesniegšanas uzņēmumiem tiek sniegtas atsauksmes un ieteikumi attiecībā uz nodokļu saistību izpildi. Uzņēmumiem ir iespēja pašiem noteikt, kam, izņemot ETCB pārvaldi, ir redzama viņu informācija [1, 5].

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

Vērtējot Latvijas Republikas VID izstrādātās un pilnveidotās Nodokļu maksātāju reitinga sistēmas ietekmi uz uzņēmumu reputāciju, autore 2025.gada aprīlī veica aptauju pēc kuras tika analizēta pētījuma dalībnieku (sk. 4.attēlu) attieksme pret reitinga sistēmu.
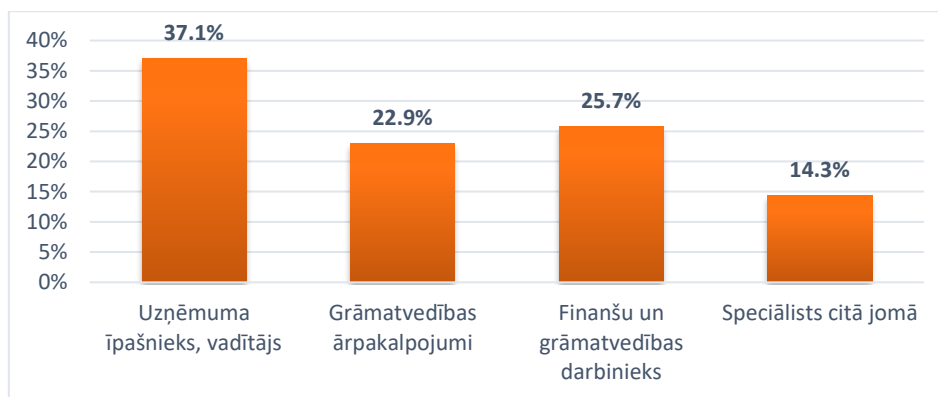
4.attēls. **Aptaujāto profils**

(autores veidots, VisiDati.lv, 30.04.2025)

Ņemot vērā to, ka Latvijas Republikas VID izstrādātā Nodokļu maksātāju reitinga sistēma tika prezentēta uzņēmējiem 2018.gada 20.septembrī un no 2023. gada 28. decembra ikvienam uzņēmējam savā EDS profilā ir iespēja iepazīties ar piešķirto nodokļu maksātāja reitingu, autore izpētīja respondentu informētību (sk. 5.attēlu) par viņiem piešķirto VID nodokļu maksātāja novērtējumu.
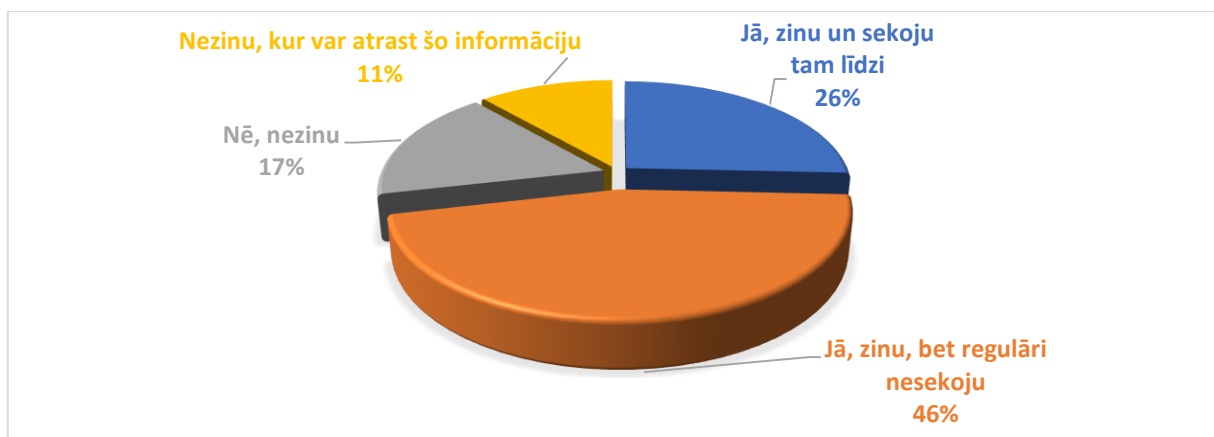

5.attēls. **Aptaujāto informētība par viņiem piešķirto VID nodokļu maksātāja reitingu**

(autores veidots, VisiDati.lv, 30.04.2025)

Autore secina, ka lai gan 72% respondentu norāda, ka viņi ir informēti par sava uzņēmuma reitinga novērtējumu, tomēr vien ceturtā daļa respondentu (26%) mērķtiecīgi seko tam līdzi. Turpretī gandrīz katrs desmitais respondents (11%) atzīst, ka nezin, kur var atrast informāciju par uzņēmuma novērtējumu. Autore uzskata, ka tas var norādīt gan uz informācijas pieejamības trūkumu, gan uz motivācijas trūkumu uzņēmumu vidū. Rezultāti atklāj, ka reitinga sistēma ir zināma, bet nav pietiekami aktīvi izmantota uzņēmumu ikdienas praksē.

No 2024. gada 28. februāra ikviens interesents VID publiskojamo datu bāzē [7] var aplūkot Latvijas uzņēmumu nodokļu maksāšanas reitinga kopējo novērtējumu. Ņemot vērā iepriekš minēto, autore izpētīja respondentu viedokli (skat. 6. attēlu) par to, vai publiski pieejamais nodokļu maksātāja reitings ir ietekmējis viņiem saistošā uzņēmuma reputāciju.
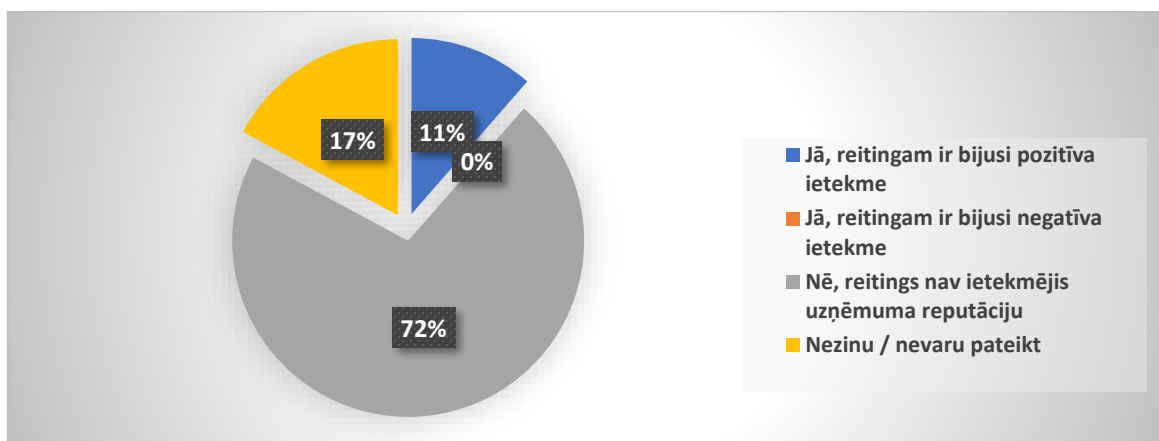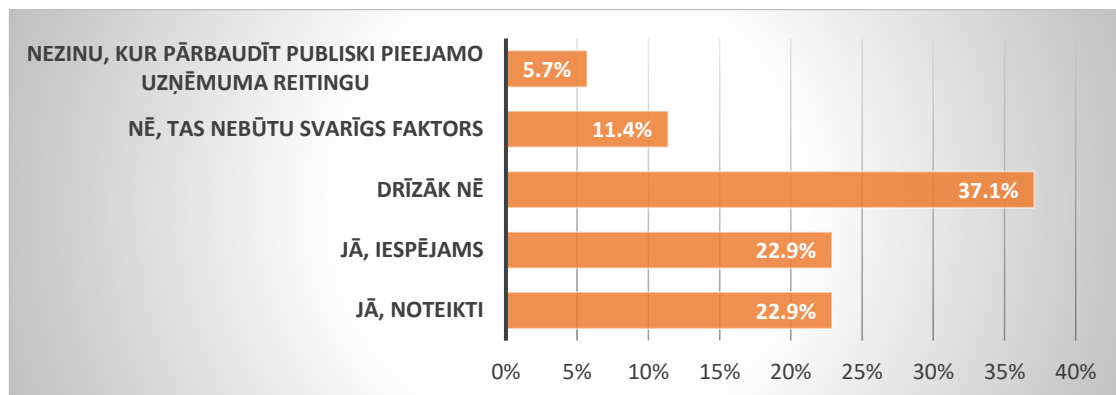
6.attēls. **Aptaujāto viedoklis par publiski pieejamā nodokļu maksātāja reitinga ietekmi uz uzņēmuma reputāciju**

(autores veidots, VisiDati.lv, 30.04.2025)

Saņemtie dati liecina par to, ka vairums aptaujāto (72%) neuzskata, ka reitingam būtu bijusi kāda ietekme, kas var liecināt par neitrālu reitinga iedarbību uz uzņēmuma reputāciju vai arī uz to, ka reitinga sistēmas priekšrocības, nav pietiekami novērtētas uzņēmumu vidū. Tikai neliela respondentu daļa (11%) ir izjutuši labvēlīgu ietekmi. Negatīva reitinga ietekme uz reputāciju nav konstatēta vispār (0%). Tajā pašā laikā 17% respondentiem nav skaidrības par reitinga ietekmi uz uzņēmuma reputāciju. Tas var norādīt uz to, ka uzņēmumu vadītāji nav pārliecināti, ka sadarbības partneri pievērš uzmanību šim novērtējumam un ka tas ir nepieciešams tikai VID vajadzībām.

Pētījuma laikā autore izvērtēja, vai publiski pieejamais reitinga novērtējums varētu ietekmēt aptaujāto lēmumu par sadarbības uzsākšanu ar jaunu biznesa partneri. Atbildes liecina par reitinga sistēmas lomu kā uzticamības rādītāju uzņēmējdarbības praksē (skat. 7. attēlu).

7.attēls. **Aptaujāto viedoklis par to vai viņi ņemtu vērā publiski pieejamo VID nodokļu maksātāja reitingu, izvērtējot potenciālo sadarbības partneri vai darba devēju Latvijā**

(autores veidots, VisiDati.lv, 30.04.2025)

Autore secina, ka lai gan kopumā 45,8% respondentu apliecina, ka reitingam būtu piešķirta nozīme potenciālā sadarbības partnera izvērtēšanā, taču vairāk nekā puse aptaujāto uzskata, ka tas nebūtu svarīgs faktors, ka arī citiem trūkst zināšanas, kur var atrast un pārbaudīt šo informāciju.

KOPSAVILKUMS. CONCLUSION

Vērtējot Latvijas Republikas VID izstrādātās un pilnveidotās Nodokļu maksātāju reitinga sistēmas potenciālu kā uzticamības rādītāju uzņēmējdarbības praksē, pētījuma rezultāti liecina, ka lai arī rīks var kalpot kā reputācijas sabiedrotājs, tā praktiskā izmantošana vēl ir ierobežota interpretācijas grūtību dēļ. Sabiedrības izpratne par to vēl tikai veidojas. No VID puses būtu nepieciešama papildu komunikācija un sabiedrības izglītošana par to, kā reitings var sekmēt uzņēmumu publiskā tēla stiprināšanu. Uzņēmumu īpašnieki nav īpaši informēti par sistēmu. Pētījuma rezultāti atklāj, ka vairāk informācijas ir grāmatvedības darbiniekiem.

Informācija par augstākam A reitinga līmenim nodrošinātām priekšrocībām nodokļu un muitas jomā ir maz izplatīta sabiedrības vidū. Nav arī vērojams pietiekams stimuls, lai uzņēmumi ar B reitingu būtu motivēti uzlabot savu saistību izpildi, lai stiprinātu savu ārējo tēlu. VID pastāv potenciāls veikt aktīvāku informācijas izplatīšanu un rosināt regulāru uzņēmumu reitinga novērtējuma pārbaudi.

Pētījuma laikā atklājās respondentu šaubas par reitinga novērtējuma objektivitāti, jo tas tiek ģenerēts automatizēti, vienlaikus piemērojot visiem uzņēmumiem vienotus vērtēšanas kritērijus. Tātad, sistēma nav pielāgota un reitinga noteikšanai nav iespējams ņemt vērā tādu informāciju par uzņēmumu, kas nav pieejama VID informācijas sistēmās. Līdz ar ko viens no būtiskākajiem iemesliem, kādēļ sistēma netiek uztverta kā uzticams indikators sabiedrības vidū ir tās ierobežotās spējas pielāgoties katra individuāla uzņēmuma specifikai.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. The European Labour Authority. (JANUARY 2022). *Tax behaviour rating e-service, Estonia*: https://www.ela.europa.eu/sites/default/files/2022-01/GP-fiche_EE_Tax-behaviour-ratings.2022_EN.pdf#:~:text=The%20Estonian%20Tax%20and%20Customs%20Board%20%28ETCB%29%20launched,and%20information%20to%20companies%20about%20their%20tax%20behaviour
2. Finanšu ministrija. (28.12.2023). *Uzņēmējiem pieejama jaunā nodokļu maksātāju reitinga sistēma:* https://www.fm.gov.lv/lv/jaunums/uznemejiem-pieejama-jauna-nodoklu-maksataju-reitinga-sistema
3. Finanšu ministrija. (28.02.2024). *VID tīmekļvietnē turpmāk apskatāms katra uzņēmuma nodokļu maksāšanas reitings*: https://www.fm.gov.lv/lv/jaunums/vid-timeklvietne-turpmak-apskatams-katra-uznemuma-nodoklu-maksasanas-reitings
4. Likumi.lv. (18.02.1995). *Likums par nodokļiem un nodevām*: https://likumi.lv/ta/id/33946-par-nodokliem-un-nodevam
5. Estonian Tax and Customs Board. (03.04.2024). *What the tax behaviour ratings tell you*: https://www.emta.ee/en/business-client/e-services-training-courses/advice/what-tax-behaviour-ratings-tell-you
6. Valsts ieņēmumu dienests. (28.12.2023). *Uzņēmējiem pieejama jaunā nodokļu maksātāju reitinga sistēma; VID aicina uz semināru*: https://www.vid.gov.lv/lv/jaunums/uznemejiem-pieejama-jauna-nodoklu-maksataju-reitinga-sistema-vid-aicina-uz-seminaru
7. Valsts ieņēmumu dienests. (09.11.2024). *VID publiskojamo datu bāze*: https://www.vid.gov.lv/lv/vid-publiskojamo-datu-baze
8. Valsts ieņēmumu dienests. (11.02.2025). *Nodokļu maksātāju reitinga sistēma*: https://www.vid.gov.lv/lv/nodoklu-maksataju-reitinga-sistema
9. Valsts ieņēmumu dienests. (01.03.2025). *Nodokļu maksātāju, kam noteikts reitings, datu vizualizācija*: https://www.vid.gov.lv/lv/nodoklu-maksataji-0
10. Valsts ieņēmumu dienests. (2025). *Elektroniskās deklarēšanas sistēma*: https://eds.vid.gov.lv/login/
11. Valstybinė mokesčių inspekcija prie Lietuvos Respublikos finansų ministerijos. (20.11.2019). *Minimalūs patikimo mokesčių mokėtojo kriterijai*: https://www.vmi.lt/evmi/minimalus-patikimo-mokesciu-moketojo-kriterijai-40-1-str.-
12. Valstybinė mokesčių inspekcija prie Lietuvos Respublikos finansų ministerijos. (22.04.2025). *Papildoma informacija apie mokesčių mokėtojus:* https://www.vmi.lt/evmi/mokesciu-moketoju-informacija

13. Zvērinātu advokātu birojs "Ellex Kļaviņš" SIA. (05.02.2024). *A, B, C vai kā VID tagad vērtēs nodokļu maksātājus?*: https://ellex.legal/lv/a-b-c-vai-ka-vid-tagad-vertes-nodoklu-maksatajus/
14. LV portāls. (10.03.2020). *Nodokļu maksātāja reitings – arī reputācijas vizītkarte*: https://lvportals.lv/skaidrojumi/313951-nodoklu-maksataja-reitings-ari-reputacijas-vizitkarte-2020
15. LV portāls. (15.01.2024). *Kas ietekmē nodokļa maksātāju reitingu, un kādas priekšrocības sagaida A grupas uzņēmumus:* Kas ietekmē nodokļa maksātāju reitingu, un kādas priekšrocības sagaida A grupas uzņēmumus - LV portāls

ECOSYSTEM FORM OF ECONOMIC INTERACTION IN THE TECHNOLOGY SECTOR

Iryna Korablinova

PhD in Economics, Associate Professor,
Ukraine
State University of Intelligent Technologies and Telecommunications
e-mail: i.a_korablinova@suitt.edu.ua

ABSTRACT

Modern companies that initiate and undergo digital transformation are evolving into complex cross-industry networked business structures that adopt new business models. Over the past ten to fifteen years, nearly all technology companies have become the core and/or integral parts of various digital business ecosystems. This study focuses on multi-ecosystem partnerships in the technology sector, encompassing thousands of companies. Through the lens of complementary interactions among modern international tech companies, the study explores the nature of a new form of economic coordination that transcends classical market structure models.

Keywords: technology companies, multi-ecosystem partners, economic interaction

ЕКОСИСТЕМНА ФОРМА ЕКОНОМІЧНОЇ ВЗАЄМОДІЇ В ТЕХНОЛОГІЧНОМУ СЕКТОРІ

АНОТАЦІЯ

Сучасні компанії, які ініціюють та проходять шлях цифрової трансформації, перетворюються у складні міжгалузеві мережеві бізнес-структури, які використовують нові бізнес-моделі. За останні десять-п'ятнадцять років майже всі технологічні компанії стали ядром та/або частинами різних цифрових бізнес-екосистем. У фокусі уваги цього дослідження – мультиекосистемні партнерства у технологічному секторі, які охоплюють тисячі компаній. Через призму комплементарної взаємодії сучасних міжнародних технологічних компаній досліджено природу нової форми економічної координації, яка виходить за межі класичних моделей ринкових структур.

Ключові слова: технологічні компанії, мультиекосистемні партнери, економічна взаємодія

ВСТУП. INTRODUCTION

У цифрову епоху аналіз умов функціонування та розвитку сучасних компаній потребує нових підходів. Особливо це стосується діяльності технологічних компаній, логіка взаємодії яких виходить за межі не тільки традиційного ринку, а й часто за межі ринків недосконалої конкуренції (олігополії, монополістичної конкуренції тощо).

Економічна взаємодія, яка характерна учасникам технологічного сектору, в останні роки приймає форму великих бізнес-екосистем, які функціонують на основі новітніх інформаційних та комунікаційних технологій (ІКТ).

До подібних бізнес-моделей компанії масово почали переходити під час реалізації стратегій цифрової трансформації [1]. Якщо практика їх застосування спочатку цікавила представників стратегічного менеджменту, то сьогодні, коли кількісні зміни перетворюються у якісні, це явище переходу до екосистемного виду економічної взаємодії, потребує осмислення на більш фундаментальному (політекономічному) рівні аналізу.

Метою дослідження є вивчення мультиекосистемних партнерств у технологічному секторі для розширення теоретичних уявлень про нову форму економічної взаємодії.

Теоретичною та методологічною основою дослідження є системний підхід, діалектична логіка до розгляду економічних явищ і процесів, теоретичні узагальнення і порівняння, методи аналізу і синтезу, індукції, дедукції, абстрагування, спостереження.

ОСНОВНІ ТЕОРЕТИЧНІ ТА ПРАКТИЧНІ ПОЛОЖЕННЯ.
BASIC THEORETICAL AND PRACTICAL PROVISION

Концепт екосистем в економіці бере свій початок з одного боку, з економічної думки про нові форми конкуренції та пошук джерел конкурентних переваг через асоційовані, комплементарні, партнерські союзи, а з іншого, з теорії стратегічного менеджменту у частині пошуку ефективних бізнес-моделей. Існує низка концепцій, які, на наш погляд, передували виникненню екосистемного підходу: концепція співпраці конкурентів, концепція міжорганізаційної (мережевої) взаємодії та партнерських відносин, концепція стратегічних альянсів, концепція кластерів, концепція «відкритих інновацій», концепція майбутньої корпорації (перетворення корпорації на мережу) та ін., які більш докладно розглянуто у дослідженні [2].

Сьогодні екосистемам різного роду, які зустрічаються в економічній дійсності, присвячують свої дослідження як науковці [3, 4], так й експерти міжнародних консалтингових агенцій [5, 6]. Дослідження EY (2022) показало, що успішні екосистеми сприяють зростанню доходів на 16,2%, прибутку на 16,5% та скороченню витрат на 14,6% [6]. Але вже у 2024 році, результати опитування EY свідчать, що 77% лідерів екосистем мають труднощі з точки зору стратегії та бізнес-планування [7]. У зв'язку з цим викликає інтерес досвід міжнародних технологічних компаній, які є ініціаторами та учасниками цілої низки екосистем.

РЕЗУЛЬТАТИ ДОСЛІДЖЕНЬ ТА ЇХ ОЦІНКА.
RESEARCH RESULTS AND THEIR EVALUATION

Спостереження за діями провідних міжнародних технологічних компаній в останнє десятиліття свідчать про організацію ними цифрових бізнес-екосистем, які відрізняються «глобальним масштабом, комплементарністю, динамічністю, гнучкістю, складністю, мультипродуктовістю, мультиакторністю, багатоплатформністю тощо» [8].

Для аналізу сучасних проявів мультиекосистемного партнерства в технологічному секторі ми досліджували дані Partnerbase, створеної у 2020 році IT-компанією Crossbeam. Це унікальна база даних про понад 130000 компаній, які уклали понад 400000 партнерських угод [9]. Згідно цієї бази такі компанії як Amazon, Microsoft, Alphabet (Google), SAP, Salesforce, HP та ін. можна віднести до «мультиекосистемних партнерів», адже вони одночасно є партнерами низки технологічних екосистем.

Дослідження профілю партнерських екосистем технологічних компаній свідчить, що існує тісний партнерський зв'язок між екосистемами компаній, які, згідно ринкової логіки, є конкурентами на окремих ринках. Наприклад, за даними Statista, станом на кінець 2024 року 63% світового ринку послуг хмарної інфраструктури контролювали такі три постачальника: Amazon (Amazon Web Services (AWS) – 33%), Microsoft (Microsoft Azure – 20%), Alphabet (Google Cloud – 10%) [10]. При цьому рівень перетину партнерських екосистем, які організовані цими компаніями, є досить високий, що свідчить про розширені комплементарні зв'язки у цих мультиекосистемах.

Так, у партнерській екосистемі AWS налічується 5644 компанії, а в партнерській екосистемі Microsoft – 3978 компаній; в обох екосистемах існує 1417 компаній, що

становить 25% екосистеми партнерів Amazon Web Services та 36% екосистеми партнерів Microsoft. Своєю чергою, у партнерській екосистемі Google налічується 5283 компанії. Порівнюючи її з екосистемою Microsoft, можна бачити, що в цих обох екосистемах існує спільних 1620 компанії, що становить 31% екосистеми партнерів Google та 41% екосистеми партнерів Microsoft. При цьому такі великі оркестратори, які координують процеси і відносини у своїх екосистемах, одночасно є учасниками інших великих партнерських екосистем, ініційованими іншими міжнародними технологічними компаніями. Наприклад, Salesforce координує партнерську екосистему, куди входить 5984 компанії, зокрема вищезгадані технологічні гіганти, які створили свої екосистеми на базі AWS, Microsoft Azure, Google Cloud відповідно. Вони також мають перехресні партнерські екосистеми [9]:

– Salesforce & Amazon: в обох екосистемах є спільні 966 компаній, що становить 16% партнерської екосистеми Salesforce та 17% партнерської екосистеми AWS;

– Salesforce & Microsoft: в обох екосистемах є спільні 1379 компаній, що становить 23% екосистеми партнерів Salesforce та 35% екосистеми партнерів Microsoft;

– Salesforce & Google: в обох екосистемах є спільні 1413 компаній, що становить 24% екосистеми партнерів Salesforce та 27% екосистеми партнерів Google.

Своєю чергою, такі компанії як Amazon як яскравий приклад мультиекосистемного партнера, окрім екосистеми, побудованої навколо AWS (хмарні рішення), має ще інші екосистеми, зокрема навколо Amazon Marketplace (e-commerce), Alexa & Smart Home (IoT-екосистема), Amazon Advertising (Martech-рішення) та ін. Така складна мережева форма взаємодії на основі сучасних ІКТ, має свої, відмінні від ринкової системи, атрибути, які потребують окремого детального аналізу.

ВИСНОВКИ. CONCLUSION

Результати досліджень свідчать, що провідні міжнародні технологічні компанії є перехідними формами, оскільки вони одночасно функціонують за логікою різних форм економічної взаємодії – і ринкового (товарно-грошового), і мережевого типу (від горизонтальних бізнес-мереж до розширених складних мультиекосистемних партнерських комплексів). Ці та інші питання, потребують подальших досліджень для осмислення змісту нової форми економічної взаємодії у цифрову епоху, зокрема в інвестиційно-інноваційному, фінансовому, маркетинговому, соціальному контекстах.

СПИСОК ЛІТЕРАТУРИ. REFERENCES

1. Vial, G. (2019). Understanding Digital Transformation A Review and a Research Agenda. *The Journal of Strategic Information Systems,* 28, 118-144.
2. Кораблінова, І. А. (2018). Компетенції компаній у цифрову епоху: content & context: монографія. К.: Кафедра, 340 с.
3. Shen, L., Shi, Q., Parida, V., Jovanovic, M. (2024). Ecosystem orchestration practices for industrial firms: A qualitative meta-analysis, framework development and research agenda. *Journal of Business Research*, vol. 173. DOI: https://doi.org/10.1016/j.jbusres.2023.114463.
4. Oberländer, A. M., Karnebogen P., Rövekamp P., Röglinger M., Leidner D. E. (2025). Understanding the Influence of Digital Ecosystems on Digital Transformation: The OCO (Orientation, Cooperation, Orchestration) Theory. *Information Systems Journal*. 35, no. 1, pp. 368–413. DOI: https://doi.org/10.1111/isj.12539.
5. Lin, J., & Wulfraat, P. (2020). Four strategies to orchestrate a digital ecosystem. *Boston Consulting Group (BCG).* URL: https://www.bcg.com/publications/2020/four-strategies-to-orchestrate-digital-ecosystem.
6. Sarafin, G. (2022). The CEO Imperative: How mastering ecosystems transforms performance. *Ernst & Young (EY).* URL: https://www.ey.com/en_gl/alliances/the-ceo-imperative-how-mastering-ecosystems-transforms-performance.

7. Sarafin, G. (2024). The CEO Imperative: Are you mastering your ecosystem strategy? *Ernst & Young (EY).* URL: https://www.ey.com/en_cn/ecosystems/the-ceo-imperative-are-you-mastering-your-ecosystem-strategy.
8. Кораблінова, І., Ганжа, К. (2023). Цифрові екосистеми у міжнародному технологічному бізнесі. *Economics. Finances. Law*. № 12. DOI: https://doi.org/10.37634/efp.2023.12.8.
9. Partnerbase. A Crossbeam Company. URL: https://www.partnerbase.com/.
10. Vailshery, L.S. (2025). Vendor market share in cloud infrastructure services market worldwide 2017-2024. *Statista.* https://www.statista.com/statistics/967365/worldwide-cloud-infrastructure-services-market-share-vendor/.

ILGTSPĒJAS ZIŅOŠANA KĀ STRATĒĢISKAIS RĪKS: UZŅĒMUMA "JŪRMALAS ŪDENS" GADĪJUMA IZPĒTE

Agnese Rātfeldere, Latvija
Baltijas Starptautiskā akadēmija, Rīga
Maģistrs starptautiskajās finansēs un ekonomikā
Email aratfeldere@gmail.com
Zinātniskais vadītājs: Mg.oec., doc. Inese Ratanova

ANOTĀCIJA

Raksts "Ilgtspējas ziņošana kā stratēģiskais rīks: uzņēmuma "Jūrmalas ūdens" gadījuma izpēte" analizē ilgtspējas ziņošanas attīstību, normatīvo regulējumu (GRI, CSRD u.c.) un uzņēmuma stratēģisko virzību uz ilgtspēju. Pētījumā aplūkoti ESG aspekti, Latvijas uzņēmumu pieredze un "Jūrmalas ūdens" darbība, uzsverot ilgtspējas integrāciju vadībā, reputācijā un ilgtermiņa attīstībā.

Atslēgvārdi: ESG (vides, sociālie un pārvaldības) faktori; Ilgtspējas ziņošana; Korporatīvā sociālā atbildība; Stratēģiskā vadība

ABSTRACT

The article *"Sustainability Reporting as a Strategic Tool: A Case Study of the Company 'Jūrmalas Ūdens'"* analyzes the development of sustainability reporting, regulatory frameworks (GRI, CSRD, etc.), and the company's strategic transition toward sustainability. The study examines ESG aspects, the experience of Latvian companies, and the operations of "Jūrmalas Ūdens," emphasizing the integration of sustainability into management, reputation, and long-term development.

Keywords: ESG (Environmental, Social, and Governance) factors; Sustainability Reporting; Corporate Social Responsibility; Strategic Management

IEVADS. INTRODUCTION

Globālo vides, sociālo un ekonomisko izaicinājumu kontekstā uzņēmējdarbības vide piedzīvo būtiskas pārmaiņas. Gan nacionālā, gan starptautiskā mērogā arvien lielāku nozīmi iegūst ilgtspējas principi, kuru ievērošana tiek uzskatīta ne tikai par ētiskas uzņēmējdarbības sastāvdaļu, bet arī par ilgtermiņa izaugsmes priekšnoteikumu. Ilgtspējas ziņošana ir viens no galvenajiem mehānismiem, kā uzņēmumi var atklāti informēt par savu ietekmi uz vidi, sabiedrību un pārvaldību, vienlaikus strukturējot un nostiprinot savu stratēģisko virzību uz atbildīgu attīstību.

Pētījuma aktualitāti nosaka Eiropas Savienības jaunā normatīvā bāze, īpaši **Korporatīvās ilgtspējas ziņošanas direktīva (CSRD)**, kas paredz stingrākas prasības uzņēmumiem publiskot informāciju par ESG (*Environmental, Social, Governance*) jautājumiem. Latvijā šie noteikumi skar arī pašvaldību kapitālsabiedrības, padarot pētījumu par ilgtspējas ziņošanas ieviešanu īpaši nozīmīgu.

Darba **mērķis** ir izpētīt ilgtspējas ziņošanas būtību un tās pielietojumu kā stratēģisku vadības instrumentu, analizējot uzņēmuma "Jūrmalas ūdens" gadījumu. Tiek risināts galvenais **pētījuma jautājums**: kā ilgtspējas ziņošana var veicināt uzņēmuma konkurētspēju, reputāciju un ilgtspējīgu attīstību?

Metodoloģiski darbs balstīts uz monogrāfisko metodi, salīdzinošo analīzi, dokumentu izpēti, kā arī uz intervijām ar uzņēmuma vadības pārstāvjiem.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

Teorētiskais ietvars balstīts vairākās vadības un organizāciju teorijās. **Ieinteresēto pušu teorija** [5][4] uzsver uzņēmuma pienākumu ņemt vērā ne tikai akcionāru, bet arī citu ieinteresēto pušu intereses – darbiniekus, sabiedrību, partnerus. **Leģitimitātes teorija[10][5]** izceļ uzņēmuma nepieciešamību darboties sabiedrības vērtību kontekstā, lai saglabātu savu "sociālo licenci". Savukārt **stratēģiskās vadības teorija[8][6]** apliecina, ka ESG aspektu integrācija ļauj uzņēmumiem plānot, vadīt un uzraudzīt darbību ilgtspējīgi un mērķtiecīgi.

Ilgtspējas ziņošanas attīstību veicina arī starptautiski pieņemti standarti un ietvari, piemēram:

GRI (Global Reporting Initiative)[7][7] – plaši izmantots vispārējs ziņošanas ietvars;

SASB [9][8] – īpaši piemērots investoru vajadzībām;

TCFD [11][9] – fokusējas uz klimata finanšu riskiem;

CSRD [3][10] – ES direktīva, kas nosaka juridiski saistošas prasības ziņošanai.

Šie dokumenti veido pamatu pārskatāmai, salīdzināmai un datu balstītai ziņošanai, kura kalpo kā stratēģiska vadības sistēma uzņēmuma ilgtermiņa mērķu īstenošanai.

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

Uzņēmums **SIA "Jūrmalas ūdens"** ir pašvaldības kapitālsabiedrība, kuras pamatdarbība ir ūdensapgādes un kanalizācijas pakalpojumu nodrošināšana Jūrmalas pilsētas teritorijā. Pētījuma gaitā tika analizēta uzņēmuma esošā prakse ESG aspektos, kā arī izstrādāta un testēta potenciālā ilgtspējas ziņojuma veidne, balstoties uz GRI struktūru.

Vides dimensijā uzņēmums veic ieguldījumus ūdenssaimniecības infrastruktūras modernizācijā, energoefektivitātes uzlabošanā un aprites ekonomikas ieviešanā. Tiek izmantoti atjaunojamie energoresursi un samazināti oglekļa emisiju apjomi.

Sociālajā dimensijā uzņēmums akcentē iedzīvotāju informēšanu, darbinieku drošības uzlabošanu un sabiedriskās līdzdalības veicināšanu.

Pārvaldības aspektā uzsākts process, kurā tiek noteiktas būtiskās ilgtspējas jomas un ESG rādītāji. Tomēr vēl trūkst vienotas datu apkopošanas sistēmas un zināšanu pārneses mehānismu.

---

[4] Freeman, R. E. (1984). *Strategic management: A stakeholder approach*. Boston: Pitman.

[5] Suchman, M. C. (1995). *Managing legitimacy: Strategic and institutional approaches*. Academy of Management Review, 20(3), 571–610.

[6] Porter, M. E., & Kramer, M. R. (2011). *Creating shared value*. Harvard Business Review, 89(1/2), 62–77.

[7] GRI. (2021). *Global Reporting Standards*. Amsterdam: Global Reporting Initiative.

[8] SASB. (2020). *Sustainability Accounting Standards Board Standards*.

[9] TCFD. (2017). *Recommendations of the Task Force on Climate-related Financial Disclosures*.

[10] European Commission. (2021). *Corporate Sustainability Reporting Directive (CSRD)*.

Pētījumā secināts, ka ilgtspējas ziņošana var veicināt iekšējo komunikāciju, mērķu izvirzīšanu, ārējo pārskatāmību un finanšu pievilcību, ja vien tiek strukturēti ieviesta un balstīta uz atbilstošiem standartiem.

KOPSAVILKUMS. CONCLUSION

Galvenie secinājumi:
1. Ilgtspējas ziņošana sniedz uzņēmumam būtisku atbalstu stratēģiskajā plānošanā un reputācijas veidošanā.
2. "Jūrmalas ūdens" attīsta vairākas iniciatīvas ESG jomās, taču trūkst formālas, standartizētas ziņošanas struktūras.
3. Ilgtspējas rādītāju identificēšana un atspoguļošana palīdz saskaņot uzņēmuma mērķus ar sabiedrības un politikas veidotāju gaidām.

Priekšlikumi:
1. **Ieviešana**: izstrādāt un katru gadu atjaunot ilgtspējas ziņojumu atbilstoši CSRD un GRI prasībām.
2. **Apmācība**: organizēt regulāras darbinieku apmācības ESG datu ievākšanā un interpretācijā.
3. **Sadarbība**: veidot partnerības ar pašvaldību un augstskolām ESG attīstībā.
4. **Integrācija**: sasaistīt ESG indikatorus ar uzņēmuma attīstības stratēģiju un budžetēšanu.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. Cheng, B., Ioannou, I., & Serafeim, G. (2014). *Corporate social responsibility and access to finance*. Strategic Management Journal, 35(1), 1–23.
2. Eccles, R. G., Ioannou, I., & Serafeim, G. (2014). *The impact of a corporate culture of sustainability on corporate behaviour and performance*. Harvard Business School Working Paper.
3. European Commission. (2021). *Corporate Sustainability Reporting Directive (CSRD)*.
4. European Green Deal. (2019). *Communication from the Commission: The European Green Deal*.
5. Freeman, R. E. (1984). *Strategic management: A stakeholder approach*. Boston: Pitman.
6. Friede, G., Busch, T., & Bassen, A. (2015). *ESG and financial performance: Aggregated evidence from more than 2000 empirical studies*. Journal of Sustainable Finance & Investment, 5(4), 210–233.
7. GRI. (2021). *Global Reporting Standards*. Amsterdam: Global Reporting Initiative.
8. Porter, M. E., & Kramer, M. R. (2011). *Creating shared value*. Harvard Business Review, 89(1/2), 62–77.
9. SASB. (2020). *Sustainability Accounting Standards Board Standards*.
10. Suchman, M. C. (1995). *Managing legitimacy: Strategic and institutional approaches*. Academy of Management Review, 20(3), 571–610.
11. TCFD. (2017). *Recommendations of the Task Force on Climate-related Financial Disclosures*.

PROFESIJA GRĀMATVEDIS: TRADĪCIJAS IR NOTURĪGAS, PRASĪBAS MAINĀS

Angelina Tjurina
Latvia
The College of Accountancy and Finance, Riga
Study programme: Accounting and Finance
Email: tjurinaangelina@inbox.lv

ANOTĀCIJA

Grāmatveža profesija tradicionāli ir pieprasīta darba tirgū. Saglabājas augsta interese par grāmatveža profesiju studentu un darba devēju vidū. Tomēr līdz ar ekonomikas digitalizāciju un rutīnas procesu automatizāciju grāmatveža profesionālās darbības saturs būtiski mainās. Šīs izmaiņas nosaka jaunu grāmatvedības speciālista profilu. Pētījuma mērķis ir izvērtēt grāmatveža profesijas attīstības perspektīvas un profesionālās lomas izmaiņas digitālās transformācijas apstākļos.

Atslēgvārdi: digitalizācija, grāmatveža kompetence, profesijas pieprasījums

ABSTRACT

Accountancy has traditionally been a profession in demand on the labour market. Interest in the accounting profession remains high among students and employers. However, with the digitalisation of the economy and the automation of routine processes, the content of the accountant's professional activity is changing significantly. These changes are defining a new profile for the accounting professional. The aim of this study is to assess the development perspectives of the accountancy profession and the changes in the professional role in the context of digital transformation.

Keywords: accountancy competence, demand for the profession, digitalisation

IEVADS. INTRODUCTION

Grāmatveža profesija tradicionāli ir pieprasīta darba tirgū, bet mainās prasības grāmatveža profesionālajām kompetencēm. Procesu digitalizācija un automatizācija nosaka jaunu speciālista profilu grāmatvedības jomā.

Galvenā pētījuma metode ir statistikas datu analīze par periodu no 2022. līdz 2024. gadam - lai izpētītu intereses par grāmatveža profesijas dinamiku (pamatojoties uz datiem par augstskolu absolventu skaitu programmā "Grāmatvedība un nodokļi"), kā arī grāmatvedības pakalpojumu tirgus analīzi (izmantojot datus par grāmatvedības pakalpojumus sniedzošo uzņēmumu skaitu). Tiek izmantota arī sekundāro avotu interpretācija (literatūras apskats) - lai noteiktu globālās un nacionālās tendences profesijas pārveidē. Pētījumā aplūkotas galvenās profesijas pārveides tendences.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

Ziņojumā par darba vietu nākotni starp visstraujāk sarūkošajām darba vietām, 2025. –2030. gadā tiek norādītas grāmatvedības un algu uzskaites darbinieki.[2]. Pēdējā laikā diezgan bieži dzirdams viedoklis, ka grāmatveža profesija nesaglabāsies. Pastāv uzskats, ka mākslīgais intelekts spēs aizstāt grāmatvedi. Tomēr ir svarīgi nepieņemt šos apgalvojumus bez kritiskas analīzes.

Absolventu skaits specialitātē "Grāmatvedība" un ārpakalpojumu uzņēmumu aktīvā attīstība apliecina pastāvīgu interesi par šo profesiju. Programma "Grāmatvedība un nodokļi" joprojām ir pieprasīta un pievilcīga.
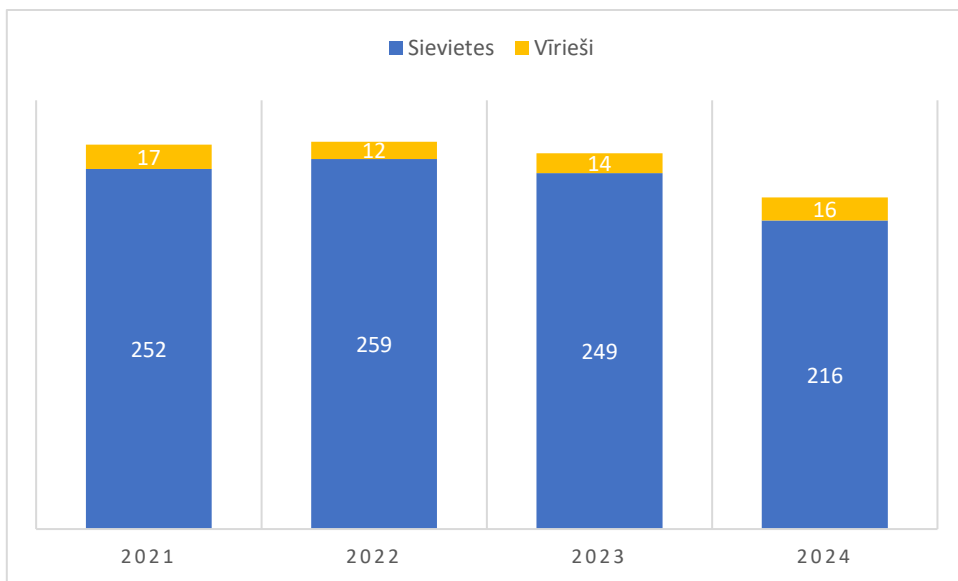

1.attēls. Augstskolās un koledžās grādu ieguvušie pēc dzimuma un izglītības programmā "Grāmatvedība un nodokļi" [1].
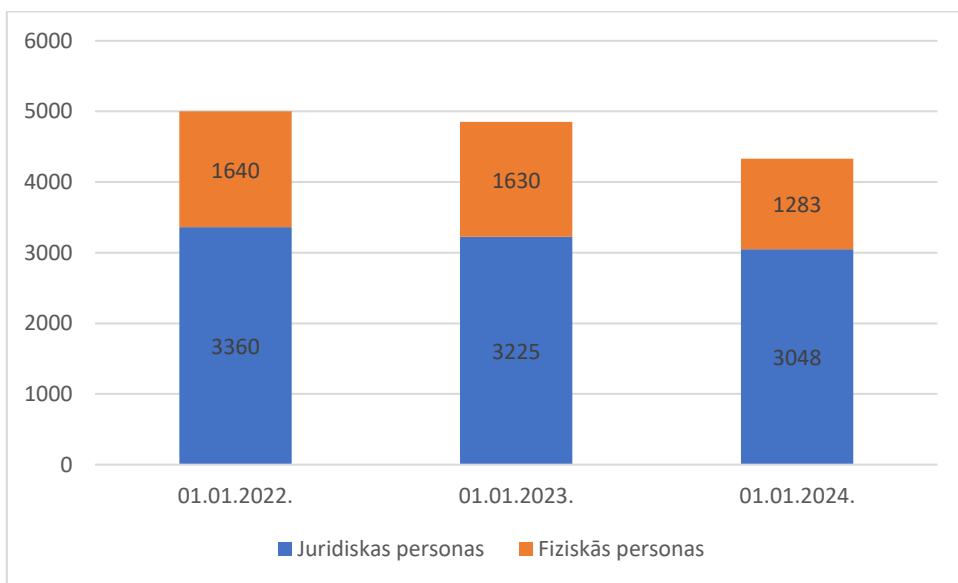
2.att. Nodokļu maksātāju skaita struktūra uz 1.janvāri: darbības veids - Uzskaites, grāmatvedības, audita un revīzijas pakalpojumi. [4].

Pēdējos trijos gados reģistrēto ārpakalpojuma grāmatvežu kopējam skaitam ir tendence samazināties. Uz 2024.gada 01.janvāri Latvijā reģistrēto grāmatvedības ārpakalpojumu sniedzēju skaits sastādīja 4331 komersantus (skat. 2.att.). No tiem 70% ir juridiskas personas un kopš 2022.gada 1.janvāra komersantu skaits, kas savu darbību reģistrējušas ar NACE kodu 69.20 (Uzskaites, grāmatvedības, audita un revīzijas pakalpojumi) ir samazinājies par 669 pakalpojumu sniedzējiem, jeb par 12%.

Ir svarīgi paskaidrot, ka 2023. gada 1. jūliju stājas spēkā noteikumi, kas paredz, ka grāmatvedības ārpakalpojuma sniegšana bez licences būs aizliegta un tie ārpakalpojuma grāmatveži, kuri nebūs saņēmuši licenci, vairs nedrīkstēs turpināt sniegt grāmatvedības pakalpojumus. Bez šaubām licencēšanas process izraisīja lielas pārmaiņas nozarē.
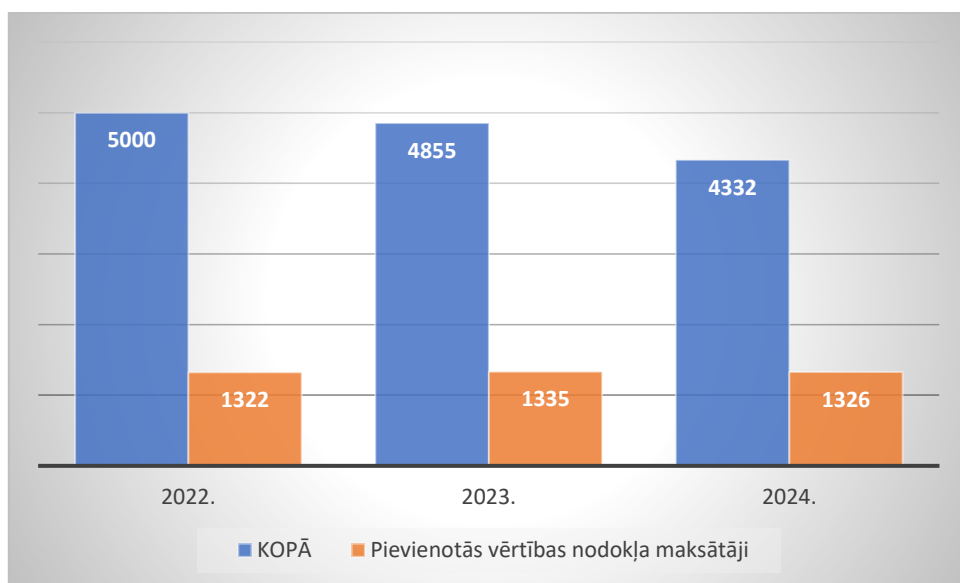
3.attēls. [4].

Starp kopējo nodokļu maksātāju skaitu, kas sniedz uzskaites, grāmatvedības, audita un revīzijas pakalpojumus, pievienotās vērtības nodokļa maksātāju īpatsvars pieaug. Tā 2022. gadā tikai 26,44% nodokļu maksātāju bija pievienotās vērtības nodokļa maksātāji (PVN). Bet 2024. gadā PVN maksātāji bija jau 30,60% no kopējā nodokļa maksātāju skaita nozarē. Grāmatvedības pakalpojumu tirgus attīstās.

Analizējot informāciju par darba vietām atbilstoši darba devēju iesniegtajiem pārskatiem, redzams, ka analizējamā periodā darba vietu skaits specialitātē grāmatvedis pieaug.
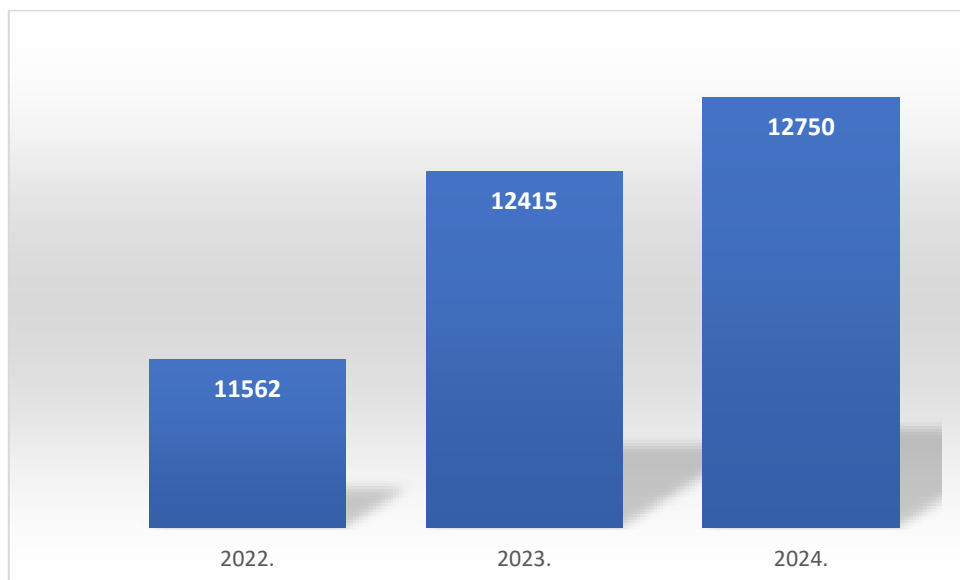
4.attēls. Darba vietu skaits profesijā "Grāmatvedības speciālisti"[4].

Publicētie dati liecina, ka pēdējos trijos gados grāmatvedības speciālisti ir pieprasīti. Grāmatveža profesija jau daudzus gadus ir viena no pieprasītākajām un stabilākajām darba tirgū. Tas skaidrojams ar to, ka grāmatvedība, kontrole un pārskatu sniegšana ir neatņemama jebkuras organizācijas darbības sastāvdaļa neatkarīgi no nozares vai uzņēmējdarbības mēroga.

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

Studentu interese un darbinieku skaita pieaugums grāmatvedības pakalpojumu firmās ir ļoti skaidrs rādītājs, ka profesija ir pieprasīta un attīstās. Tas liecina, ka grāmatveža profesija saglabājas aktuāla. Runas par to, ka grāmatveža profesija varētu izzust, rodas vairāku iemeslu dēļ, kas saistīti ar tehnoloģiju attīstību un darba tirgus pārmaiņām. Tomēr šīs runas bieži vien ir pārspīlētas vai balstītas uz nepilnīgu izpratni par profesijas būtību un tās iespējām nākotnē.

Grāmatveža profesija vēsturiski balstīta uz tādiem ilgtspējīgiem principiem kā:
- ✓ Precizitāte un uzticamība no sabiedrības, biznesa un valsts puses
- ✓ Normatīvo prasību un atskaites standartu ievērošana
- ✓ Ētikas principi — godīgums, konfidencialitāte, atbildība
- ✓ Kontroles un pārredzamības funkcija resursu pārvaldībā

Neraugoties uz tehnoloģiskajām pārmaiņām, šie pamatelementi saglabājas nemainīgi un apliecina grāmatveža nozīmi kā uzticama un kompetenta speciālista.

Ryan Lazanis savā 2025. gada rokasgrāmatā grāmatvežiem norāda, ka tehniskās zināšanas grāmatvedības un nodokļu jomā joprojām ir ļoti svarīgas, taču to relatīvā nozīme pēdējos desmit gados ir mainījusies, jo ir attīstījušās tehnoloģijas un parādījusies datu analītika. Tas nozīmē, ka būs nepieciešamas ne tikai tehniskās un datu pārvaldības prasmes, bet arī jaunas prasmes, lai saglabātu grāmatveža profesijas konkurētspēju - salīdzinājumā ar citām profesijām. [3].

Ilze Palmbaha Latvijas Republikas Grāmatvežu asociācijas valdes locekle, savā publikācijā atsaucas uz Sertificēto grāmatvežu asociācijas *ACCA* pētījumu. Saskaņā ar ACCA redzējumu, nākotnes grāmatveža profesionālais profils būs būtiski daudzveidīgāks. ACCA paredz, ka nākotnē grāmatvedības nozarē radīsies piecas apakšprofesijas:
- Datu navigators izmanto jaunās tehnoloģijas, lai datu analīze palīdzētu uzņēmumam pieņemt tālredzīgus lēmumus un īstenot kvalitatīvu finanšu pārvaldību;
- Digitālās saspēles vadītājs saredz uzņēmuma digitālās pārveides potenciālu, uzlabo datu pārvaldību un organizē jaunāko tehnoloģiju ieviešanu visās uzņēmuma nodaļās;
- Ilgtspējas novators mēra darba efektivitāti, izvērtē funkciju lietderību un uzlabo vadības grāmatvedību, lai sniegtu precīzāku informāciju ieinteresētajām personām un līdzsvarotu peļņas gūšanu ar pienesumu sabiedrībai;
- Risku pārvaldības aizstāvis uzņēmumā ienes jauna līmeņa uzticību un godīgumu, uzlabo darbības caurskatāmību, veic funkciju auditus, ievieš labāko praksi un kontroles mehānismus, nodrošinot normatīvo aktu ievērošanu un risinot nodokļu jautājumus. Risku pārvaldības aizstāvis aktīvi piedalās biznesa stratēģijas izstrādē , attīstībā un ieviešanā, uzlabo biznesa procesus.
- Biznesa pārveidotājs uzņēmumā nodrošina organizatoriskas vai finanšu izmaiņas un izstrādā biznesa stratēģijas, vai arī strādā nelielā inovatīvā grāmatvedības uzņēmumā, kas palīdz klientiem pārveidot savu biznesu. [5].

Šīs apakšprofesijas uzskatāmi parāda, ka grāmatvedis vairs nav tikai finanšu datu reģistrētājs, bet kļūst par datu analītiķi, digitālās pārveides virzītāju, stratēģijas veidotāju un uzticamības

garantu.Tādējādi mainās kompetenču struktūra, iekļaujot digitālās, komunikācijas, ilgtspējas un ētiskās prasmes.

Tab.1. Nepieciešamās grāmatveža kompetences

Prasmes	Kompetences
Digitālās prasmes	Darbs ar digitālajām sistēmām, it kompetences
Profesionālās iemaņas	Dziļas zināšanas atskaitēs, nodokļos, standartos.
Uzņēmējdarbības prasmes	Izpratne par biznesu, stratēģiskā domāšana, darbs ar riskiem.
Mīkstās prasmes	Komunikācija, adaptitāte, kritiskā domāšana, ētika.

Pēc Eiropas Komisijas pasūtījuma, lai atbalstītu Eiropas digitālās programmas un Eiropas prasmju stratēģijas mērķus tika izstrādāts Iedzīvotāju digitālo prasmju ietvars (DigComp). DigComp tika izstrādāts ar mērķi definēt, attīstīt un novērtēt digitālās kompetences, kas nepieciešamas katram iedzīvotājam, lai efektīvi, droši un atbildīgi darbotos digitālajā sabiedrībā. DigComp nav veidots specifiski grāmatvežiem, bet tā piecas pamatjomās aptver universālas digitālās prasmes, kas ir tieši pielietojamas arī grāmatveža profesionālajā darbā.[6].

Tab.2. Grāmatveža prasmes DigComp 2.2 ietvarā

DigComp 2.2 joma	Grāmatveža jaunās prasmes
Informācijas un datu pratība	Datu meklēšana, kritiskā analīze, finanšu informācijas novērtēšana.
Komunikācija un sadarbība digitālajā vidē	Attālināta sadarbība, e-rēķinu aprite, komunikācija ar IT speciālistiem un klientiem.
Digitālā satura veidošana	Vizualizāciju veidošana, sistēmu automatizācija, konfigurācija bez programmēšanas.
Drošība	Personas datu aizsardzība, dokumentu drošība, kiberdrošības pamatprincipi.
Problēmu risināšana digitālajā vidē	Tehnisku kļūdu risināšana, procesu analīze un pielāgošana, elastība digitālajā vidē.

Atbilstoši Eiropas Digitālās kompetences ietvaram DigComp 2.2 (2022), digitālo prasmju jomas aptver ne tikai tehnisko iemaņu pārvaldīšanu, bet arī spēju komunicēt digitālajā vidē, ievērot drošības un datu aizsardzības principus, veidot digitālu saturu un risināt problēmsituācijas. Šāda pieeja sekmē profesionāļu konkurētspēju un pielāgošanos tehnoloģiskajām pārmaiņām visā Eiropas darba tirgū.

Mākslīgais intelekts neaizvieto grāmatvežus, bet prasa viņiem attīstīt jaunas prasmes un pāriet uz augstāku profesionālās vērtības līmeni. Tas nozīmē, ka mākslīgais intelekts ir rīks, nevis aizstājējs.

Tab.3. Ko nevar aizstāt mākslīgais intelekts

Funkcija	Kāpēc mākslīgais intelekts neaizstās
Datu analīze un interpretācija	Nepieciešams uzņēmējdarbības konteksts, izpratne par lēmumu sekām.
Nestandarta lēmumu pieņemšana	Mākslīgais intelekts darbojas pēc modeļiem, nevis ar nenoteiktību

Saziņa ar klientiem un valsts iestādēm	Pārrunas, ziņojumu skaidrošana, aizstāvība
Riska novērtējums, atbilstība tiesību aktiem	Likumi mainās un tiek interpretēti dažādi.
Ētiskā un profesionālā atbildība	Nepieciešama "cilvēciskā seja" un ekspertu vērtējums.

KOPSAVILKUMS. CONCLUSION

Grāmatveži nākotnē būs datu pārvaldnieki, konsultanti un analītiķi, nevis tikai datu ievades speciālisti. Grāmatveža profesija mainās līdz ar pasauli, bet tās nozīme paliek nemainīga - organizācijai vienmēr ir vajadzīgi cilvēki, kas prot strādāt ar skaitļiem un pārvērst tos vadības zināšanās. Tādējādi pastāvīgais pieprasījums pēc profesijas tiek pārveidots kvalitatīvi jaunā līmenī. Pieprasījums ir ne tikai pēc grāmatveža, bet pēc jaunas paaudzes grāmatveža - elastīga, digitāli zinoša speciālista ar labi attīstītām analītiskām un komunikācijas prasmēm.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. https://data.stat.gov.lv/pxweb/lv/OSP_PUB/START__IZG__IG__IGA/IGA080/
2. Future_of_Jobs_Report_2025.pdf; https://reports.weforum.org/docs/WEF
3. Ryan Lazanis Future of Accounting: The 2025 Annual Guide February 21, 2025 / Featured, Practice management; https://futurefirm.co/future-of-accounting/#skills
4. https://www.vid.gov.lv/lv/nozaru-statistikas-katalogs
5. https://www.visma.lv/blogs/gramatveza-profesijas-izmainas-sodien-un-rit/
6. Vuorikari, R., Kluzer, S., & Punie, Y. (2022). *The Digital Competence Framework for Citizens (DigComp 2.2): With new examples of knowledge, skills and attitudes* (EUR 31006 EN). Publications Office of the European Union; https://data.europa.eu/doi/10.2760/115376

TIESĪBU ZINĀTNES AKTUĀLĀS PROBLĒMAS

TOPICAL PROBLEMS OF LEGAL SCIENCE

USE OF ARTIFICIAL INTELLIGENCE IN THE STUDY PROCESS

Oskars Garkājs, The Republic of Latvia
Sabiedrība ar ierobežotu atbildību "Rīgas Menedžmenta Koledža"
Study Program "Tourism Services Organization"
e-mail: oskars.garkajs@college.lv

ABSTRACT

Artificial Intelligence is a rapidly developing field of technology that can already significantly change the economy, education and society, as well as provide various benefits to the economy, education and society. The range of Artificial Intelligence tools is growing every day, also affecting the study process in universities – they are increasingly used by both students and lecturers.

The aim of the Research is to provide insight into the legal framework of Artificial Intelligence regarding the use of Artificial Intelligence in the study process and to promote the use of Artificial Intelligence in the study process in accordance with the legal acts of the European Union and the Republic of Latvia regulating the field of Artificial Intelligence.

Research tasks:

1) to analyze the legal acts of the European Union and the Republic of Latvia in the field of Artificial Intelligence;
2) to characterize the competence of individual institutions and organizations in the field of Artificial Intelligence;
3) to characterize current trends in the use of Artificial Intelligence in the study process;
4) to characterize possible risks in the use of Artificial Intelligence in the study process.

Keywords: Artificial Intelligence; Legal Framework; Students; Study process; Technologies

ANOTĀCIJA

Mākslīgais intelekts ir tehnoloģiju joma, kas strauji attīstās un jau šobrīd var būtiski mainīt ekonomiku, izglītību un sabiedrību, kā arī sniegt dažādus ieguvumus ekonomikai, izglītībai un sabiedrībai. Mākslīgā intelekta rīku klāsts ar katru dienu pieaug, ietekmējot arī studiju procesu augstskolās – tos aizvien plašāk izmanto gan studējošie, gan docētāji.

Pētījuma mērķis ir sniegt ieskatu mākslīgā intelekta tiesiskajā regulējumā attiecībā uz mākslīgā intelekta izmantošanu studiju procesā un veicināt mākslīgā intelekta izmantošanu studiju procesā atbilstoši mākslīgā intelekta jomu reglamentējošajiem Eiropas Savienības un Latvijas Republikas tiesību aktiem.

Pētījuma uzdevumi:

1) izanalizēt Eiropas Savienības un Latvijas Republikas tiesību aktus mākslīgā intelekta jomā;
2) raksturot atsevišķu institūciju un iestāžu kompetenci mākslīgā intelekta jomā;
3) raksturot aktuālās tendences mākslīgā intelekta izmantošanai studiju procesā;
4) raksturot iespējamos riskus mākslīgā intelekta izmantošanai studiju procesā.

Atslēgvārdi: Mākslīgais intelekts; Studējošie; Studiju process; Tehnoloģijas; Tiesiskais regulējums

INTRODUCTION

The Research topic is relevant and significant due to the fact that Artificial intelligence, hereinafter – AI, is a rapidly evolving field of technology that can already significantly change the economy and society. By improving forecasting, optimizing the allocation of activities and resources, and personalizing digital solutions available to individuals and organizations, the use of AI can provide significant competitive advantages for companies and promote outcomes beneficial to society and the environment, for example in security, energy, energy efficiency, infrastructure management, education, culture, agriculture, public services, sports, justice, transport and logistics, healthcare, and environmental monitoring.

The aim of the Research: to provide insight into the legal framework of AI regarding the use of AI in the study process and to promote the use of AI in the study process in accordance with the legal acts of the European Union, hereinafter – EU, and the Republic of Latvia regulating the field of AI.

Research problem: AI users, especially in the private sector, as well as students, often lack a detailed understanding of the legal framework for AI – the EU and Latvian legal acts governing this area. AI solutions are becoming an essential component in various industries and sectors, creating new risks that need to be taken into account in the development and application of the legal acts. Errors in training or data can lead to inaccurate or discriminatory results, particularly affecting vulnerable groups in society. To address this problem, it is important to create a safe and reliable environment for the development and implementation of AI solutions.

Research methods: analysis of literature and information sources (content analysis), comparative and empirical method.

BASIC THEORETICAL AND PRACTICAL PROVISIONS

AI is a rapidly developing field of technology that can already significantly change the economy, education and society, as well as provide various benefits to the economy, education and society. The range of AI tools is growing every day, also affecting the study process in universities – they are increasingly used by both students and lecturers. The use of AI can provide significant competitive advantages for students and promote results that are beneficial to society.

AI solutions are becoming an essential component in various industries and sectors, including the study process, creating new risks that must be taken into account in the development and application of legal acts. AI users often lack a detailed understanding of the legal framework for AI – the EU and Latvian legal acts regulating the field of AI.

EU legal acts in the field of AI:
1) Announcement from the European Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions "Coordinated Plan on the development of Artificial Intelligence Made in Europe" (07.12.2018) [2.];
2) European Commission *White Paper on Artificial Intelligence – A European approach to excellence and trust* (19.02.2020) [3.];
3) Regulation (EU) 2024/1689 of the European Parliament and of the Council of 13 June 2024 laying down harmonised rules on artificial intelligence and amending Regulations (EC) No 300/2008, (EU) No 167/2013, (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1139 and (EU) 2019/2144 and Directives 2014/90/EU, (EU) 2016/797 and (EU) 2020/1828 (Artificial Intelligence Act) (13.06.2024) [1.];

Regulation (EU) 2024/1689 (Artificial Intelligence Act) aims to improve the functioning of the internal market and promote the use of human-centric and trustworthy AI, while ensuring a high level of protection of health, safety, fundamental rights, including democracy and the rule of law, and the environment against harmful effects of AI-systems in the EU, and supporting innovation. The European AI Office has been established at EU level.

Legal acts of the Republic of Latvia in the field of AI:
1) Information report "On the development of artificial intelligence solutions" (The Cabinet of Ministers, 04.02.2020) [6.];
2) Order No.577 of the Cabinet of Ministers of 16 July 2024 "On the National Research Program "Analysis of the Suitability of Artificial Intelligence Methods in the Field of European Union Fund Projects" for 2024-2025" [5.];

3) Digital Transformation Guidelines for 2021-2027 (Cabinet of Ministers, 07.07.2021) [7.];
4) Artificial Intelligence Centre Law (*Saeima*, 06.03.2025; entered into force on 20.03.2025) [4.]. The purpose of the Law is to create an AI technology ecosystem and a legal framework for cooperation between the public sector, the private sector and universities, as well as to determine the purpose of the establishment and operation of the foundation "Artificial Intelligence Centre", its legal status, tasks, rights, organizational structure, sources of financing and the procedure for using the funds allocated to it. The secretariat function of the Artificial Intelligence Centre (MIC) is provided by the State Digital Development Agency (VDAA). Regarding the execution of delegated state administration tasks, the Artificial Intelligence Centre (MIC) is under the supervision of the Smart Administration and Regional Development (VARAM).

Legal framework deficiencies:
1) Artificial Intelligence Centre Law [4.] only determines the competence of the Artificial Intelligence Centre as a foundation (establishment goals, functions, tasks, rights), but does not determine detailed AI development issues;
2) other external regulatory acts of the Republic of Latvia also do not determine detailed AI development issues;
3) for an AI user, the provisions of the Regulation (EU) 2024/1689 (Artificial Intelligence Act) [1.] are often too complicated and difficult to understand;
4) the external regulatory acts of the Republic of Latvia do not contain detailed legal regulations on the use of AI in the study process.

Risks in using of AI in the study process:
1) lack of information processing and in-depth analysis capabilities;
2) decreased critical thinking abilities;
3) use of unauthorized / unlicensed AI tools;
4) lack of compliance with ethics and data protection;
5) lack of common quality guidelines;
6) lack of skills in using AI;
7) overconfidence in AI, without critical analysis;
8) critical fields of study for using AI. For example, medicine;
9) what is being assessed – the student's knowledge or the solution offered by the AI tool / system / technology?
10) when to allow to use AI in the study process – only in the exams; only for homework; always; never; in which study courses/study subjects?

RESEARCH RESULTS AND THEIR EVALUATION

The Author of the Research has achieved the Aim of the Research, has fulfilled the Tasks arising from the Aim of the Research, and has investigated the Research Problem. The Author of the Research provides conclusions and proposals arising from the conclusions.

CONCLUSIONS AND PROPOSALS

1. In the Republic of Latvia, various development planning documents have been approved in the field of AI and the Law on the Artificial Intelligence Centre (MIC) has been adopted.

2. Key institutions in the Republic of Latvia in the field of digital communication and AI: Ministry of Smart Administration and Regional Development (VARAM); State Digital Development Agency (VDAA); Artificial Intelligence Centre (MIC).
3. A full understanding and application of the legal framework for AI in practice promotes the development of innovation and technology, which in turn improves the quality and efficiency of services in various sectors, such as education, public administration, and healthcare.
4. AI users often lack a detailed understanding of the legal framework for AI during their studies – the EU and Latvian legal acts regulating the field of AI, as well as the EU and Latvian legal acts regulating the processing and protection of personal data.
5. AI users should take into account the risks associated with the use of AI during the study process and promote the improvement of AI skills in the student environment in order to promote the development of AI technologies and ensure their ethical, responsible and safe use.
6. AI users must take into account the rights of natural persons (data subjects) and ensure the protection of the rights of natural persons (data subjects). This can be achieved by complying with EU and Latvian regulatory enactments in the field of processing and protection of natural persons' data.
7. AI users should familiarize themselves in detail with the legal framework of AI during their studies – the EU and Latvian legal acts regulating the field of AI. This can minimize the risks of using AI and prevent possible errors in using AI.
8. To ensure a high-quality educational process and outcome, students need to learn critical thinking more than ever before, while lecturers need to obtain high-quality guidelines to assess student performance and manage the study process as a whole.

REFERENCES

1. Regulation (EU) 2024/1689 of the European Parliament and of the Council of 13 June 2024 laying down harmonised rules on artificial intelligence and amending Regulations (EC) No 300/2008, (EU) No 167/2013, (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1139 and (EU) 2019/2144 and Directives 2014/90/EU, (EU) 2016/797 and (EU) 2020/1828 (Artificial Intelligence Act). *Official Journal of the European Union*, 12.07.2024, No.2024/1689.
2. Announcement from the European Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions "Coordinated Plan on the development of Artificial Intelligence Made in Europe". Adopted by the European Commission on 07.12.2018, COM (2018) 795 final. https://eur-lex.europa.eu/legal-content/LV/TXT/HTML/?uri=CELEX:52018DC0795&from=DE
3. European Commission *White Paper on Artificial Intelligence – A European approach to excellence and trust*. Adopted by the European Commission on 19.02.2020, COM (2020) 65 final. https://eur-lex.europa.eu/legal-content/LV/TXT/PDF/?uri=CELEX:52020DC0065
4. Artificial Intelligence Centre Law *(Mākslīgā intelekta centra likums)*. *Latvijas Vēstnesis*, 19.03.2025, No.55.
5. Order No.577 of the Cabinet of Ministers of 16 July 2024 "On the National Research Program "Analysis of the Suitability of Artificial Intelligence Methods in the Field of European Union Fund Projects" for 2024-2025", *Latvijas Vēstnesis*, 16.07.2024, No.138.
6. Information report "On the development of artificial intelligence solutions" (The Cabinet of Ministers of the Republic of Latvia, 04.02.2020). https://likumi.lv/ta/id/342405-par-maksliga-intelekta-risinajumu-attistibu.
7. Digital Transformation Guidelines for 2021-2027. Approved by the Cabinet of Ministers of the Republic of Latvia by the Order No.490 "On Digital Transformation Guidelines for 2021-2027", *Latvijas Vēstnesis*, 07.07.2021, No.133.

PAR PIEĻAUŠANU VADĪT TRANSPORTLĪDZEKĻUS PERSONĀM, KURAS IR ALKOHOLA, NARKOTISKO, PSIHOTROPO, TOKSISKO VAI CITU APREIBINOŠU VIELU IETEKMĒ PROBLEMĀTIKU

Mg. iur. **Jānis Ievītis,** Latvija
Baltijas Starptautiskā akadēmija, Rīga
e-pasts: janisievitis@inbox.lv

ANOTĀCIJA

Ceļu satiksmes likumā un Krimināllikumā ir noteikts atbildības apjoms personām, kuras vada transportlīdzekli alkohola reibumā vai narkotisko vai citu apreibinošo vielu ietekmē. Turklāt, Krimināllikumā ir noteikta atbildība par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju atbildīgajai personai par pieļaušanu vadīt transportlīdzekli personai, kura ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē, ja tā rezultātā cietušajam nodarīts viegls, vidēja smaguma vai smags miesas bojājums vai tā izraisījusi cilvēka nāvi. Taču nevienā normatīvajā aktā nav paredzēta atbildība par pieļaušanu vadīt transportlīdzekli personai, kura atrodas alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē.

Šī raksta mērķis ir izpētīt nepieciešamību noteikt atbildību par pieļaušanu vadīt transportlīdzekli personai, kura atrodas alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē.

Atslēgvārdi: pieļaušana vadīt transportlīdzekli, par transportlīdzekļa tehnisko stāvokli vai ekspluatāciju atbildīgā persona, transportlīdzekļa vadītājs, kriminālatbildība

ABSTRACT

The Road Traffic Law and the Criminal Law establish the scope of liability for persons who drive a vehicle under the influence of alcohol or narcotics or other intoxicating substances. In addition, the Criminal Law establishes the liability of the person responsible for the technical condition or operation of vehicles for allowing a person to drive a vehicle under the influence of alcohol, narcotics, psychotropic, toxic or other intoxicating substances, if as a result the victim has suffered minor, moderate or severe bodily injury or has caused the death of a person. However, no regulatory act provides for liability for allowing a person to drive a vehicle under the influence of alcohol, narcotics, psychotropic, toxic or other intoxicating substances.

The purpose of this article is to examine the need to establish liability for allowing a person to drive a vehicle under the influence of alcohol, narcotics, psychotropic, toxic or other intoxicating substances.

Keywords: permission to drive a vehicle, person responsible for the technical condition or operation of the vehicle, driver of the vehicle, criminal liability

IEVADS. INTRODUCTION

2024. gada 1. aprīlī pagāja 25 gadi, kopš stājies spēkā Krimināllikums. 25 gadi darbībā – tas tādam likumam kā Krimināllikums, atļaušos teikt, ir brieduma gadi. Viss notiek attīstībā, un KL nav un arī nākotnē nebūs izņēmums [1]. Savu nozīmi arī mūsdienās nav zaudējuši Krimināllikuma tapšanas procesā izvirzītie mērķi: normu savstarpējā saskaņotība, skaidrība, sankciju savstarpējais samērīgums [2].

Arī patreiz Saeimas Juridiskajā komisijā norit diskusija par Krimināllikuma papildināšanu ar 259.[1] pantu, paredzot kriminālatbildību par ceļu satiksmes noteikumu vai transportlīdzekļu ekspluatācijas noteikumu ļaunprātīgu pārkāpšanu, kas izpaudusies kā agresīva braukšana pēc kompetentas institūcijas amatpersonas atkārtotas vai vairākkārtējas prasības apturēt transportlīdzekli [3].

Minētais liecina ne tikai par Krimināllikuma, bet par visu tiesību normu nemitīgu attīstību ejot līdzi laikam, tāpēc raksta autors izraisa diskusiju par Krimināllikuma 264. panta normas grozījumiem.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

2022. gada 25. novembrī stājās spēkā grozījumi Krimināllikuma 262. pantā, papildinot to ar pirmās daļas prim daļu, nosakot kriminālatbildību par transportlīdzekļa vadīšanu vai mācīšanu vadīt transportlīdzekli, ja izelpotā gaisa vai asins pārbaudē konstatētā alkohola koncentrācija asinīs pārsniedz 1,5 promiles, vai par transportlīdzekļa vadīšanu vai mācīšanu vadīt transportlīdzekli, atrodoties narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē [4].

Līdz tam personām ar transportlīdzekļa vadīšanas tiesībām par transportlīdzekļu vadīšanu ar alkohola koncentrāciju asinīs virs 0,2 vai 0,5 promilēm iestājas administratīvā atbildība pēc Ceļu satiksmes likuma 62. panta [5].

No Ģenerālprokuratūras gada atskaitēm par 2023. gadu redzams, ka kopumā uzsākti 2722 kriminālprocesi pēc Krimināllikuma 262. panta [6], bet 2024. gadā 2572 kriminālprocesi [7].

Ģenerālprokurors J.Stukāns arī uzsver, ka saskaņā ar Valsts policijas sniegto informāciju 2024. gadā kopumā aizturēti 3173 transportlīdzekļa vadītāji alkohola reibumā un 149 transportlīdzekļa vadītāji narkotisko vielu iespaidā, vēl 115 transportlīdzekļa vadītāji no alkohola ietekmes pārbaudes atteicās [8].

No 2023. un 2024. gadu statistikas jau iespējams spriest par 2022. gadā veikto izmaiņu nepieciešamību, secinājums - grozījumi bija nepieciešami, tie ir nepieciešami arī turpmāk, iespējams tādēļ Ģenerālprokurors masu mēdijos vairākkārt ir rosinājis diskutēt par atbildības piemērošanu dzērājšoferu līdzbraucējiem [9].

Savukārt Valsts policijas priekšnieks A.Ruks atbalstot diskusijas nepieciešamību, vienlaikus jautā, kas būs šis pasažieris- nozieguma atbalstītāja vai neziņotājs un kā pasažieris varēs noteikt promiļu daudzumu? [10]

Tāpat no CSDD veidotajām kampaņām - "Apguldīt vieglāk nekā apbedīt", "Nebrauc reibumā, dārgs prieks" [11] nepārprotami skan aicinājums - neļaut draugiem un paziņām braukt reibumā.

No vienas puses diskusija par pasažiera iespējamo atbildību ir vietā, taču tai pat laikā, kādēļ pasažierim taksometrā ir jāatbild par vadītāja rīcību, vai arī "stopētājam" jāatbild par gadījuma transportlīdzekļa vadītāja rīcību?

Par taksometra pasažieri, vai "stopētāju" skan diezgan ironiski, šeit tomēr jāsaprot, ka no vienkārša pasažiera nekādu atbildību prasīt laikam nevar, jo pasažierim pamanot, ka transportlīdzekļa vadītājs ir manāmā reibumā ir tikai viens mērķis- ātrāk izkļūt no transportlīdzekļa, tāpēc ziņošana policijai var arī izpalikt.

Novērst noziedzīgus nodarījumus un citus likumpārkāpumus ir viens no policijas uzdevumiem, noteiktiem likumā "Par policiju" [12], tas izriet arī no judikatūras, ar kuru secināts, ka arī gadījumos, kad tiesību normās nav noteikta speciālā kompetentā institūcija, kas var uzlikt pienākumu novērst pārkāpumu un sekot tā izpildei vai sodīt par normas pārkāpšanu, Valsts policijai ir vispārējā kompetence izmantot piespiedu mehānismu, lai panāktu, ka tiesību normas tiek ievērotas [13].

Vai pasažierim tomēr var iestāties kriminālatbildība par neziņošanu, vai par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju atbildīgajai personai par līdzdalību noziedzīgā nodarījuma izdarīšanā pēc Krimināllikuma 262. panta 1. un pirmās prim daļas?

Jāuzsver, ka atbildība par neziņošanu pēc Krimināllikuma 315. panta augstāk minētajos gadījumos iestāties nevar. Noziedzīgie nodarījumi pēc Krimināllikuma 262. panta pirmās un pirmās prim daļas ir mazāk smagi noziegumi, taču atbildība par neziņošanu iestājas tikai tad, ja personai ir zināms, ka tiek gatavots vai izdarīts smags vai sevišķi smags noziegums.

Turklāt, noziedzīgo nodarījumu pēc Krimināllikuma 262. panta nevar izdarīt vienlaicīgi vairākas personas.

Krimināllikuma 20. panta pirmā daļa skaidro, ka noziedzīga nodarījuma līdzdalībnieki ir organizētāji, uzkūdītāji, atbalstītāji, savukārt piektā daļa nosaka, ka līdzdalībnieks noziedzīgos nodarījumos saucams pie atbildības saskaņā ar to pašu šā likuma pantu, kas paredz izdarītāja atbildību.

No minētā izriet, ka ja par transportlīdzekli atbildīgā persona ir pieļāvusi, ka kāda cita persona, kura atrodas alkohola ietekmē vada transportlīdzekli, un kurai piemēram konstatēta alkohola koncentrācija asinīs virs Ceļu satiksmes likuma 28. pantā atļauto promiļu daudzuma, tad šī persona teorētiski būtu saucama pie kriminālatbildības pēc Krimināllikuma 20. panta ceturtās daļas un 262. panta pirmās daļas, vai pēc Krimināllikuma 20. panta ceturtās daļas un 262. panta pirmās prim daļas, ja transportlīdzekļa vadītājam ir atbilstošas kategorijas transportlīdzekļa vadīšanas tiesības.

Šāda konstrukcija nav īsti loģiska, jo nevienai personai nevar pierakstīt citas personas alkohola ietekmes promiles, vai atrašanos narkotisko vielu ietekmē. Pēc būtības transportlīdzekli nevar vadīt personu grupā, tāpēc atbildība ir stingri individuāla.

Krimināllikuma 264. pantā jau ir noteikta kriminālatbildība personai, kura ir atbildīga par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju, par pieļaušanu vadīt transportlīdzekli personai, kura ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē, taču tikai tādā gadījumā, ja transportlīdzekļa vadītājs ir izraisījis Ceļu satiksmes negadījumu un kā rezultātā cietušajam nodarīts viegls, vidēja smaguma vai smags miesas bojājums vai tā izraisījusi cilvēka nāvi.

Tas attiecas arī uz situācijām, kad Ceļu satiksmes negadījumu ar cietušajām personām izraisa lokanajā sakabē velkamā transportlīdzekļa vadītājs, jo par velkamā transportlīdzekļa vadīšanu uzskatāma arī transportlīdzekļa vadīšana, ja to velk lokanajā sakabē un velkamais transportlīdzeklis kaut kāda iemesla dēļ pats nevar pārvietoties [14].

Kura persona tad ir atbildīga par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju?

Ceļu satiksmes likuma 20. panta 2. punkts nosaka, ka transportlīdzekļa īpašnieks, valdītājs un turētājs nedrīkst dot atļauju vadīt transportlīdzekli personai, kura ir alkoholisko dzērienu, narkotisko, psihotoksisko vai citu apreibinošo vielu ietekmē, atbildību gan Ceļu satiksmes likums nav paredzējis.

Vienīgais sods, ko ir iespējams piemērot transportlīdzekļa īpašniekam (valdītājam, turētājam) ir paredzēts Ceļu satiksmes likuma 51. panta astotā daļā par atteikšanos sniegt ziņas par transportlīdzekļa vadītāju vai tā tiesisko lietotāju, par ko piemēro naudas sodu transportlīdzekļa īpašniekam (valdītājam, turētājam) no četrpadsmit līdz simt četrdesmit naudas soda vienībām.

Jāatzīmē, ka laika periodā no 2022. gada līdz 2025. gadam Rīgas reģionā ir uzsākti 914 administratīvie procesi pēc Ceļu satiksmes likuma 51. panta astotās daļas [15]. Daudz vai maz, jautājums diskutabls, taču fakti kopumā liecina vai, ka transportlīdzekļa īpašnieks (valdītājs, turētājs) tiešam dažādu iemeslu dēļ neko nezina (piemēram, pameta paaugstinātās bīstamības avotu mājas pagalmā un aizbrauca naudas peļņā), kas gan ir maz ticams, vai iespējamā mazā soda (atkarībā no situācijas) - no četrpadsmit līdz simt četrdesmit naudas soda vienībām, klaji nevēlēs nosaukt personu, kura ir lietojusi transportlīdzekli.

Atbilstoši Ceļu satiksmes likuma 1.panta 24.punktam transportlīdzekļa īpašnieks ir fiziskā vai juridiskā persona, kurai pieder transportlīdzeklis. Savukārt tā paša likuma 1.panta 25.punkts

paredz, ka transportlīdzekļa turētājs ir fiziskā vai juridiskā persona, kura uz tiesiska pamata (mantas īres, nomas, patapinājuma līgums u.c.) lieto transportlīdzekli. No minētajām normām izriet, ka transportlīdzekļa turētājs iepretim īpašniekam ir tā persona, kuras rīcībā transportlīdzeklis atrodas un kura to arī izmanto (lieto) [16].

Interpretējot minētās normas, jāsecina, ka par atbildīgo personu ir uzskatāma jebkura persona, kuras lietošanā atrodas konkrētais transportlīdzeklis, par atbildīgo var būt arī persona, kura konkrēto transportlīdzekli ir ieguvusi arī noziedzīga nodarījuma ceļā, piemēram; zādzības rezultātā, respektīvi - persona, kuras rīcībā atrodas transportlīdzeklis, to lieto ir noziedzīgā nodarījuma subjekts Krimināllikuma 264. panta izpratnē.

Par noziedzīgā nodarījuma subjektu pēc Krimināllikuma 264. panta var būt arī persona, kura transportlīdzekli lietošanā iegūst no auto nomas kompānijām, piemēram, "CITYBEE". Atbilstoši "CITYBEE" pakalpojumu lietošanas noteikumiem, lietotājam nav tiesību ļaut citām personām vadīt vai lietot Transportlīdzekli, nav tiesību nodot Transportlīdzekli apakšnomā, nodot citiem jebkādas šajos Noteikumos noteiktās tiesības vai pienākumus [17].

Piemēram, kompānijā, kurā atrodas persona un kura ir atbildīga par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju, tiek lietots alkohols, pēc kā cita, alkoholu lietojusī persona (piem., tiek konstatēta alkohola koncentrācija asinīs 0,6 promiles), ar atbildīgās personas piekrišanu vada transportlīdzekli, izraisa Ceļu satiksmes negadījumu, kura rezultātā iestājas Krimināllikuma 262. panta otrajā, trešajā, ceturtajā un piektajā daļās paredzētās sekas. Pie tam nav būtiski, vai transportlīdzekli vadījušai personai ir atbilstošas kategorijas transportlīdzekļa vadīšanas tiesības, vai nav.

Minētajā situācijā transportlīdzekļa vadītājam iestāsies kriminālatbildība pēc Krimināllikuma 262. panta attiecīgās daļas (atkarībā no cietušajai personai nodarīto miesas bojājuma smaguma), savukārt par transportlīdzekļa tehnisko stāvokli vai ekspluatāciju, atbildīgajai personai iestāsies kriminālatbildība pēc Krimināllikuma 264. panta. Secīgi, ja nav cietušo personu, tad arī atbildīgajai personai nekāda atbildība neiestājas.

Lai iestātos kriminālatbildība pēc Krimināllikuma 264. panta, par transportlīdzekli atbildīgajai personai nav jācenšas noskaidrot alkohola promiļu daudzums vai narkotisko vielu ietekme, pietiek, ka persona zina, ka cita personai, kurai tiek pieļauts vadīt transportlīdzekli atrodas alkoholisko dzērienu, narkotisko, psihotoksisko vai citu apreibinošo vielu ietekmē.

Pie tam, ņemot vērā, ka kriminālatbildība pamatā iestājas pie alkohola daudzuma asinīs virs 0,5%, (atsevišķos gadījumos gan tas ir 0,2%) kas vizuāli jau ir pamanāmi, nemaz nerunājot par lielāku alkohola promiļu daudzu vai narkotisko vai citu vielu ietekmi.

Atbildīgajai personai, pirms pieļaut tās atbildībā esošā transportlīdzekļa vadīšanu citai personai ir saistoši Ceļu satiksmes likuma 20. panta un 28. panta prasības.

Ja persona, kura ir atbildīga par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju, iedod dzērumā esošam cilvēkam automašīnas atslēgas, tādējādi pieļaujot, ka viņš vada šo transportlīdzekli, tad viegli iztēloties, ka šī persona paredz Krimināllikuma 264. pantā minēto seku iestāšanās iespēju, tomēr grūti iedomāties, kā viņa var vieglprātīgi paļauties, ka šīs sekas varēs novērst. Tādējādi Latvijā personas, kuras apzinās nodarījuma kaitīgumu, dažkārt izdara nodarījumu nevis aiz noziedzīgas pašpaļāvības, bet aiz noziedzīgas nevērības, kur kaitīguma apzināšana nemaz netiek prasīta [18].

Būtiski, ka pēdējo triju gadu laikā nav uzsākts neviens kriminālprocess pēc Krimināllikuma 264. panta. Ja miesas bojājumi nevienai personai nodarīti nav, tad arī atbildīgajai personai nekāda atbildība neiestājas, lai gan tai pat laikā transportlīdzekļa vadītājs tiks saukts pie kriminālatbildības pēc Krimināllikuma 262. panta pirmās vai 262. panta pirmās prim daļas. Abos gadījumos atbildīgās personas par transportlīdzekli darbības ir identiskas - tā ir pieļāvusi vadīt

transportlīdzekli personai, kura ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē, tikai vienā gadījumā iestājas atbildība pēc Krimināllikuma 264. panta, bet citā nē.

Tā kā Krimināllikumā jau ir 264. pants, kurš paredz kriminālatbildību par pieļaušanu vadīt transportlīdzekļus personām, kuras ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē, ja tā rezultātā ir iestājušās Krimināllikuma 262. panta otrajā, trešajā, ceturtajā vai piektajā daļās paredzētās sekas, tad arī par pieļaušanu vadīt transportlīdzekli bez minēto likuma normu paredzēto seku iestāšanos, atbildīgajai personai būtu nosakāma kriminālatbildība.

SECINĀJUMI. CONCLUSION

Lai esošas tiesību normas tiktu vienveidīgi piemērotas, nepieciešams veikt grozījumus Krimināllikuma 264. pantā, esošo panta redakciju veidot kā panta otro daļu, ieviešot pirmo daļu, nosakot, ka noziedzīgā nodarījuma sastāvu veido personas, kura ir kura ir atbildīga par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju pieļaušana vadīt transportlīdzekli personai, kura ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē, izsākot to sekojošā redakcijā:

"**264.pants Pieļaušana vadīt transportlīdzekļus personām, kuras ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē.**

Par pieļaušanu vadīt transportlīdzekli personai, kura ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē, personu, kura ir atbildīga par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju, — soda ar brīvības atņemšanu uz laiku līdz vienam gadam vai ar īslaicīgu brīvības atņemšanu, vai ar probācijas uzraudzību, vai ar sabiedrisko darbu, vai ar naudas sodu.

Par pieļaušanu vadīt transportlīdzekli personai, kura ir alkohola, narkotisko, psihotropo, toksisko vai citu apreibinošu vielu ietekmē, ja tā rezultātā cietušajam nodarīts viegls, vidēja smaguma vai smags miesas bojājums vai tā izraisījusi cilvēka nāvi, personu, kura ir atbildīga par transportlīdzekļu tehnisko stāvokli vai ekspluatāciju, — soda ar brīvības atņemšanu uz laiku līdz pieciem gadiem vai ar īslaicīgu brīvības atņemšanu, vai ar probācijas uzraudzību, vai ar sabiedrisko darbu, vai ar naudas sodu, atņemot tiesības uz noteiktu nodarbošanos uz laiku līdz pieciem gadiem."

IZMANTOTĀS LITERATŪRAS UN CITU AVOTU SARAKSTS. REFERENCES

1. Krastinš U. Krimināllikuma izstrāde un attīstība gadu gaitā: caur atmiņu prizmu. Jurista Vārds, Nr. 15 (1333), 2024. gada 9. aprīlis
2. Vīnkalna E. Krimināllikuma attīstības tendences. Latvijas Universitātes 82. starptautiskās zinātniskās konferences "Likumdošana un tās rezultāts latvijā: pagātnes mācības, mūsdienu tendences, problēmas un risinājumi" rakstu krājums. LU akadēmiskais apgāds. Izdevums Nr.26, 232-242.lpp. Pieejams: https://doi.org/10.22364/juzk.82.26
3. Grozījumi Krimināllikumā (Nr.832/Lp14) izskatīšanai otrajā lasījumā. Latvijas Republikas Saeima. Pieejams: https://titania.saeima.lv/LIVS14/saeimalivs14.nsf/0/4066F4E70DA4200EC2258C580027219F?OpenDocument
4. Krimināllikums. Pieņemts: 17.06.1998. Stājas spēkā: 01.04.1999. Publicēts: Latvijas Vēstnesis, 199/200, 08.07.1998.
5. Ceļu satiksmes likums. Pieņemts: 01.10.1997. Stājas spēkā: 04.11.1997. Publicēts: Latvijas Vēstnesis, 274/276, 21.10.1997.

6. Ģenerālprokura ziņojums par 2023. gadā paveikto un 2024. gada darbības prioritātēm, 93. lpp. Pieejams: https://prokuratura.lv/media/gallery/Gener%C4%81lprokurora_zinojums_2023.pdf

7. Ģenerālprokura ziņojums par 2024. gadā paveikto un 2025. gada darbības prioritātēm, 94. lpp. Pieejams: https://www.prokuratura.lv/media/newsfiles/Zinojums_2024.pdf

8. Ģenerālprokura ziņojums par 2024. gadā paveikto un 2025. gada darbības prioritātēm, 95. lpp. Pieejams: https://www.prokuratura.lv/media/newsfiles/Zinojums_2024.pdf

9. Ģenerālprokurors rosina diskutēt par atbildības piemērošanu dzērājšoferu līdzbraucējiem. 05.03.2025. Pieejams: https://www.lsm.lv/raksts/zinas/latvija/05.03.2025-generalprokurors-rosina-diskutet-par-atbildibas-piemerosanu-dzerajsoferu-lidzbraucejiem.a590347/

10. Sods dzērājšoferu līdzbraucējiem. Ruks vaicā: Vai viņš ir nozieguma atbalstītājs vai neziņotājs? 10.03.2025. Pieejams: https://www.la.lv/sods-dzerajsoferu-lidzbraucejiem-ruks-vaica-vai-vins-ir-nozieguma-atbalstitajs-vai-nezinotajs

11. CSDD sociālās kampaņas. Pieejams: https://www.csdd.lv/csdd/socialas-kampanas/

12. Par policiju. Latvijas Republikas likums. Pieņemts: 04.06.1991. Stājas spēkā: 04.06.1991. Publicēts: Latvijas Republikas Augstākās Padomes un Valdības Ziņotājs, 31/32, 15.08.1991.

13. Senāta Administratīvo lietu departamenta 2022.gada 10.februāra spriedums lieta Nr.A420173819, SKA-276/2022. Pieejams: ECLI:LV:AT:2022:0210.A420173819.19.S

14. Augstākās tiesas Senāta Krimināllietu departamenta 2008. gada 25. janvāra lēmums lietā Nr.SKK-33/2008 (Krimināllieta 11230012305). Pieejams: https://www.at.gov.lv/downloadlawfile/4078

15. Valsts policijas Rīgas Reģiona policijas pārvaldes sniegtā informācija. Nav publicēta.

16. Augstākās tiesas Administratīvo lietu departamenta 2016.gada 1. aprīļa spriedums lieta Nr. A420568811 SKA-33/2016. Pieejams: https://www.at.gov.lv/downloadlawfile/4259

17. CityBee pakalpojuma lietošanas noteikumi. Pieejams: https://citybee.lv/lv/pakalpojuma-lietosanas-noteikumi/

18. Baumanis J. Vainas intelektuālais un gribas moments jeb "kvantu" kriminoloģija. Jurista Vārds, Nr. 39 (942), 2016. gada 27. septembris

КОНКЛЮДЕНТНЫЕ ДЕЙСТВИЯ В ТРУДОВОМ ПРАВЕ (ПРОБЛЕМЫ, ПРАКТИКА)

Jurijs Mašošins
Doctor of Law
RISEBA University of Applied Sciences (Riga, Latvija)
jurima@inbox.lv

АННОТАЦИЯ

В статье рассматриваются понятие конклюдентных действий, их правовая основа и особенности практического применения при организации трудовых отношений. Неправильное толкование конклюдентных действий может привести к ошибкам работодателей, несоблюдению трудовых договоров и экономическим потерям.

Ключевые слова: конклюдентные действия, трудовые отношения, трудовой договор

ABSTRACT

The article focuses on the concept of conclusive actions, their legal basis and the specifics of their practical application in organizing labor relations. Inaccurate interpretation of conclusive actions can lead to mistakes by employers, non-compliance with labor contracts and economic losses.

Keywords: concludent actions, labor contracts, labor relations

ВВЕДЕНИЕ. INTRODUCTION

Цель данной статьи – рассмотреть влияние конклудентных действий на эффективность трудовых отношений и особенности использования их субьектами трудового права. Взаимодействие работодателей, работников, клиентов и других участников трудового рынка зависит от особенностей их поведения, даже их молчания. Подавляющее большинство работодателей – это коммерсанты, материальной основой деятельности которых являются договора. Конклюдентные действия – действия, которые проявляются в невербальной готовности заключить, продолжить, изменить или расторгнуть договор. Данные действия применяются в самых различных отраслях, и их использование является неотъемлемой частью современного бизнеса, поскольку они позволяют определять и интерпретировать правоотношения даже при отсутствии формального соглашения [6; 7; 12]. Например, если работник исправно выполняет свои трудовые обязанности и получает за них вознаграждение, это считается конклюдентным действием, подтверждающим продолжение трудовых отношений [16]. Применение такого действия относится к ситуациям, когда стороны действуют или ведут себя так, как если бы между ними был заключен письменный договор. Но иногда конклюдентная форма заключаемого договора используется и недобросовестными предпринимателями [5]. В случае спора при трудовых отношениях эти действия имеют важное значение, поскольку могут быть свидетельством заключения трудового договора. А в случае отказа одной из сторон, чаще всего - работодателя, от исполнения своих обязательств, совершенные действия могут служить доказательством.

В Древней Греции и Риме предполагалось, что заключение договоров могло происходить не только в устной или письменной форме, но и посредством молчаливого согласия или действия: «manu datio» — передача предмета и «stipulatio» — посредством односторонних действий, например, клятва или рукопожатие [1; 20]. В наше время такая традиция сохраняется в виде конклюдентных действий. Римское право влияет и на

латвийское законодательство. Так, Закон о труде предусматривает, что трудовые отношения могут быть прекращены и на основании фактических действий работника и работодателя, а не только на основании письменного соглашения [4, 115 ст. 5 ч.].

Необходимость отдельного рассмотрения конклудентных действий в трудовом праве вызвана следующими причинами:

1) наличие множества недостатков при применении конклудентных действий: психологических, юридических

2) особые требования к нормативно-правовой базе

3) ошибки, допускаемые законодателями и судьями в отношении конклудентных действий

4) существующие трудности у работодателей и работников с определением ситуативного характера конклудентной деятельности

5) особенности конклудентных договоров

6) ошибки участников трудовых отношений при использовании конклудентных действий

7) особенности взаимодействия конклудентных договорных отношений с «традиционными» видами договоров.

ПОНЯТИЕ, СУЩНОСТЬ И ВИДЫ КОНКЛУДЕНТНЫХ ДЕЙСТВИЙ. CONCEPT, ESSENCE AND TYPES OF CONCLUDENT ACTIONS

Понятие конклудентных действий подробно рассмотрено автором ранее [14]. Заключение или исполнение договора возможно без его подписания, действиями или молчанием. Это означает, что договор считается заключенным или исполненным на основании поведения сторон [8; 9; 10; 11; 17; 22; 23], и в определенных ситуациях работа может быть начата до заключения письменного договора.

Внешним проявлением конклудентных действий являются:

1) невербальные формы общения: жесты (рукопожатие), мимика, пантомима, взгляд, вид, иногда и молчание [14; 3, 1428 ст.]

2) особенности поведения лица (лиц), связанные с конкретными договорными отношениями, например, выплата зарплаты или соблюдение графика работы без заключения письменного трудового договора

Молчание – одна из самых сложных форм конклудентных действий. В Латвии не случайно было принято постановление Кабинета Министров о плане действий по внедрению и применению принципа «молчание-согласие» в административной практике ответственных учреждений [18], поскольку по Гражданскому закону молчание не является собственно согласием или несогласием [3, 1430 ст.]. Оно, как говорят во Франции: «ça dépend».

Сущность конклудентных действий. Психологически эти действия основаны на принципах доверия и ожидания, и по сути конклудентные действия в трудовом праве можно рассматривать как:

• молчаливое заявление о волеизъявлении или выражение воли, приведшее к соглашению сторон трудовых отношений

• одна из форм заключения трудового договора, при которой работник действует так, как если бы он уже согласился на определенные условия

• поведение работодателя и работника, из которого явно вытекает намерение заключить договор или взять на себя определенные обязательства

• юридический инструмент, обеспечивающий выполнение и защиту обязательств сторон трудового договора даже без его подписания

• ситуация, когда трудовые правоотношения созданы или изменены на основании действий обеих сторон, но стороны действовали так, как если бы это было зафиксировано в договоре. Письменная форма договора считается соблюденной, когда письменное предложение заключить договор принято в соответствии со статьями 39 и 41 Закона о труде.

• принцип молчаливого согласия, позволяющий определять наличие договорных обязательств на основе фактического поведения лиц (получение зарплаты, ношение форменной рабочей одежды и т.п.)

• юридическая категория, которая относится к заключению договоров и, следовательно, к созданию обязательств между их участниками

• юридическое понятие, обозначающее ситуации, когда действия или молчание работника могут считаться согласием на заключение или изменение договора

• юридический факт (возникновение или продолжение трудовых отношений)

Как правовое понятие, конклюдентные действия интерпретируются и применяются по-разному в разных правовых системах, регионах и ситуациях.

Конклюдентными действия могут быть не только у частных лиц (работодатели «физики»), но и у юридических лиц (предприятие)

Виды конклюдентных действий

Среди конклюдентных действий можно выделить следующие:

• по форме невербальной коммуникации: зрительные и слуховые действия: жесты, сигналы. Улыбка, рукопожатие, кивок и уважительное поведение — все это может сыграть важную роль в общении. Жесты в работе биржевого маклера. «Большой палец вверх» используется не только в электронной среде, но и как жест одобрения в реальной жизни [2].

• по месту в механизме правового регулирования: в целях заключения, продления, изменения и расторжения договора.

• методом консолидации в существующей правовой системе:

1) обязательные конклюдентные действия, предусмотренные правовыми актами. Например, если работодатель разрешает работнику продолжать работу после окончания его смены, он не может впоследствии заявить, что не желает платить работнику, поскольку отработанное время превысило согласованную смену [4, 68 ст.; 3, 1969 ст.]

2) конклюдентные действия, совершаемые в соответствии с правовым обычаем. В частности, размер комиссии за работу маклера, «обычный» в данном регионе [14; 13,70 ст.1.ч.]

• молчание можно считать согласием, если действия работника свидетельствуют о том, что он понимает и согласен с предложенными условиями [21], а действия работодателя то, что он принимает выполненную работу

• возможны конклюдентные действия, конклюдентное поведение и конклюдентный обман, когда кого-либо можно намеренно ввести в заблуждение без устных заявлений. Конклюдентное поведение таково, что оно может привести к заключению трудового договора или иного соглашения. При конклюдентном обмане человек лжет не буквально и словесно, а посредством действий и косвенных выражений обмана, например, о действительном качестве выполненной работы

• конклюдентные действия часто встречаются в мобильных и компьютерных программах, в которых пользователи, используя функции приложения или платформы, совершают действия, свидетельствующие об их согласии с разработчиком или оператором приложения [19]. Последующие действия пользователя, такие как вход в систему или регулярное использование, дополнительно подтверждают это согласие. Так, платформы

«Uber» и «Bolt» выполняют функции реальных работодателей, а водители – не «партнеры», как заявляли разработчики этих платформ, а просто наемные работники

• использование работниками правильного дресс-кода в одежде - показывает отношение к потенциальным клиентам, дресс-код в своей «работе» используют и преступники

• неисполнение работником своих трудовых обязанностей и неспособность работодателя восстановить трудовые отношения могут считаться достаточным основанием для прекращения трудовых отношений [3, 2193 ст.; 4, 101 ст.1.ч.).

ПРОБЛЕМЫ ИСПОЛЬЗОВАНИЯ КОНКЛУДЕНТЫХ ДЕЙСТВИЙ. PROBLEMS OF USING CONCLUDENT ACTIONS

Конклудентные действия применимы не во всех случаях. Как письменные и устные договоры, конклудентные договоры должны соответствовать определенным требованиям законодательства, быть четко понятными и доказуемыми. Если договор был заключен с помощью конклудентных действий, то проблем не возникает до тех пор пока стороны договора выполняют все его условия.

Но возможными проблемами могут быть:
1) различное толкование конклудентных действий из-за их частой неоднозначности. Например, жесты или выражения лица, которые могут означать одно в одной культуре, могут быть интерпретированы совершенно по-другому в другой культуре
2) если конклудентные действия не были выражены достаточно ясно, суд может не признать договор заключенным и он не будет иметь юридическую силу
3) некоторые невербальные сигналы могут вызывать у клиентов негативные ассоциации. Неправильно выбранный тон голоса, неуместная мимика или неподходящая одежда работника могут создать у клиента впечатление непрофессионализма
4) неуместность конклудентных действий, если законом установлена определенная форма волеизъявления, например, письменная форма трудового договора [4, ст.40]
5) применение конклудентного действия иногда требует дополнительных разъяснений, в результате чего заключение договора может быть отложено или отменено
6) конклудентные действия могут быть основанием для споров, когда возникают вопросы о том, достаточны ли они для заключения/расторжения либо изменения договора
7) в случае возникновения спора сложнее судить о правомерности работ, совершенных на основании конклюдентного договора
8) иногда возникают споры о том, являются ли такие действия доказательными, и какие ситуации считаются уместными для данного понятия
9) если смысл конклудентных действий отличается от письменного договора, они также могут быть основанием спора и создают необходимость их толкования судом
10) правовая неопределенность из-за отсутствия четких формулировок и наличи так называемых открытых определений относительно того, какое именно поведение можно считать основой заключения, изменения или расторжения договора.

МЕТОДЫ РЕШЕНИЯ ПРОБЛЕМ, СВЯЗАННЫХ С ИСПОЛЬЗОВАНИЕМ КОНКЛУДЕНТНЫХ ДЕЙСТВИЙ. METHODS OF SOLVING PROBLEMS RELATED TO THE USE OF CONCLUDENT ACTIONS

Основой применения данного вида действий в трудовом праве являются доверие и понимание между работодателями и работниками. Но чтобы предотвратить возможные негативные последствия их применения существуют различные методы, которые можно использовать в практике трудовых отношений. А именно:

1) тщательное определение условий трудового договора и использование дополнительной документации

2) для присвоения конклудентным действиям формы акцепта необходимо, чтобы они были совершены на условиях, указанных в договоре

3) в целях безопасности следует убедиться в согласии всех участников договора и в их взаимопонимании

4) судебная практика и юдикатура являются существенным элементом процесса правового толкования конклудентных действий: решения суда и создание прецедентов помогают понять, какие ситуации считаются конклудентными договорами и каковы критерии использования конклудентных действий

5) работники и работодатели должны быть проинформированы о приемах коммуникации во избежание недоразумений и дальнейших судебных разбирательств

6) суд часто опирается на историю отношений работодателя и работника. Если их успешное взаимодействие продолжается в течение достаточно длительного времени, суд может посчитать, что имеет место конклудентный договор

7) особое внимание следует уделять культурным и кросскультурным особенностям, а также регулярному обучению персонала эффективному невербальному общению, в т.ч. профессиональным жестам и навыкам коммуникации в процессе трудовой деятельности

8) объективная оценка конкретных рабочих ситуаций и обстоятельств, в которых имели место совершаемые действия. Это включает в себя оценку контекста поведения работника и работодателя, а также учет норм закона, обычаев и судебной практики

9) наличие прямых и косвенных доказательств будет использовано для разрешения спора об использовании конклудентного действия. Сюда могут входить письменные договоры, другие документы, записи камер видеонаблюдения, показания свидетелей

10) существуют юридические способы защиты участников трудового договора от возможных негативных последствий конклудентных действий:

• предварительное соглашение об использовании таких действий

• изучение и применение известной информации о конклудентных действиях и последствиях их применения

• юридическая помощь и консультации юристов, социальных психологов и специалистов по кросс-культурным вопросам

Это позволит принимать правильные решения о действиях, которые можно считать конклудентными, и понимать юридические последствия и риски, связанные с такими действиями.

11) использование регулярного общения между субъектами трудовых отношений

12) оценка фактических и правовых аспектов ситуации, в которой происходили конклюдентные действия, и их влияние на результаты труда

13) использование искусственного интеллекта для анализа и интерпретации конклудентных действий, повышения точности и предотвращения их неправильного использования.

ВЫВОДЫ. CONCLUSIONS

1) конклудентные действия являются существенным элементом трудовых отношений и обеспечивают гибкий механизм заключения и толкования трудовых договоров

2) применение конклудентных действий помогает работодателям обеспечить эффективное управление рабочим процессом

3) конклудентные действия признаны и используется во многих странах, их применение может варьироваться в зависимости от местных правовых систем, судебной практики и традиций

4) целесообразно внести изменения в статью 1428 Гражданского Закона Латвии «Воля может быть выражена как явно, так и молча». Из этой статьи исключить слово «молча» и дополнить эту статью словами «конклудентными действиями»

5) необходимо учитывать возможные негативные последствия при использовании конклудентных действий в трудовых отношениях и применять эти действия законно и разумно, чтобы избежать возможных споров в будущем

6) разрешение споров относительно конклудентных действий обычно осуществляется через государственную трудовую испекцию, суд или иной орган разрешения споров с учетом наличия доказательств

7) эти действия значимы, поскольку могут быть свидетельством заключения трудового договора или принятия/непринятия изменения его условий

8) для предотвращения или уменьшения возможных негативных последствий использования конклудентных действий могут использоваться различные методы и приемы, такие как письменное или техническое документирование и расширенное общение между субъектами трудовых отношений.

СПИСОК ИСПОЛЬЗОВАННОЙ ЛИТЕРАТУРЫ И ИНЫХ ИСТОЧНИКОВ ИНФОРМАЦИИ. REFERENCES

1. **Apsitis K.** Consolidation of capital in Roman law and its influence on the modern legal institutes of the Republic of Latvija (2015). https://dspace.rsu.lv/jspui/bitstream/123456789/2540/1/2015-13_Apsiitis-Allars_DTS_15-162.pdf
2. **Budkēviča K.I.** (2023) Emocijzīme kā apstiprinājums darījumam. https://itiesibas.lv/raksti/tiesvedibas/tiesvedibas/bizness-emocijzime-ka-apstiprinajums-darijumam
3. Civillikums (1937) Valdības Vēstnesis, 46, 26.02.1937. https://likumi.lv/ta/id/225418-civillikums
4. Darba Likums (2002). https://likumi.lv/ta/id/26019-darba-likums
5. **Fridrihsone M.** (2017). Veikli darboņi visā Latvijā uzpērk zemi zem mājām, lai pelnītu uz dzīvokļu iemītnieku rēķina. https://www.lsm.lv/raksts/zinas/zinu-analize/veikli-darboni-visa-latvija-uzperk-zemi-zem-majam-lai-pelnitu-uz-dzivoklu-iemitnieku-rekina.a231441/
6. **Graustiņš G.** (2020) https://lvportals.lv/e-konsultacijas/20160-vai-ir-speka-aizdevums-bez-rakstiskas-darijuma-formas-2020
7. How to conclude a contract: everything you need to know (2023) https://legality.ro/how-to-conclude-a-contract-everything-you-need-to-know/
8. Immediate action agreements and conclusive actions (2022) https://improbus.com/documents/immediate-action-agreements-and-conclusive-actions/
9. Implied contract (2021). https://corporatefinanceinstitute.com/resources/valuation/implied-contract/
10. Kas ir konkludentu darbības un kad tās apstiprina darījumu? (2023). https://www.arbitr-praktika.ru/article/2404-chto-takoe-konklyudentnye-deystviya
11. Kas ir "konkludentu darbības" un to īstenošanas iespēja, grozot līgumus? (2024) https://www.mpt.gov.by/ru/faq/5-chto-takoe-konklyudentnye-deystviya-i-vozmozhnost-ih-vypolneniya-pri-vnesenii-izmeneniy-v
12. **Kenton Will.** Implied contract: Definition, Example, Types, and Rules. (2024) https://www.investopedia.com/terms/i/implied_contract.asp
13. Komerclikums (2002) https://likumi.lv/ta/id/5490-komerclikums

14. **Lobanov G.** Konkludentas darbības (2024). https://www.lawmix.ru/comm/8483
15. **Mašošins J.** (2024). Application of conclusive actions in commercial relations (challenges and practice). Baltic Journal of Legal and Social Sciences, 2 (2) Riga, Latvia : "Baltija Publishing", 76.-85.
16. **Men, L. R. & Verčič, A. T**.(2021). *Current Trends and Issues.* 2nd Edition ed. Florida, Zagreb: Springer Nature Switzerland AG. https://www.researchgate.net/publication/354918244_Current_Trends_and_Issues_in_Internal_Communication_Theory_and_Practice_Theory_and_Practice
17. **Milberga K.** (2020.) Par konkludentu likuma nepildīšanu. https://kristamilberga.com/par-konkludentu-likuma-nepildisanu/
18. Ministru kabineta rīkojums Nr.264, (2012). Par pasākumu plānu "klusēšanas – piekrišanas" principa ieviešanai un piemērošanai atbildīgo institūciju administratīvajā praksē. https://likumi.lv/ta/id/249188-par-pasakumu-planu-klusesanas--piekrisanas-principa-ieviesanai-un-piemerosanai-atbildigo-instituciju-administrativaja-prakse
19. Mobilo aplikāciju droša izmantošana (2017). https://www.esidross.lv/2017/03/14/mobilo-aplikaciju-drosa-izmantosana/
20. Quick Summary of Datio (2024). https://dlssolicitors.com/define/datio/
21. **Richard Austen-Baker, Qi Zhou** (2023) Understanding Contract Law. https://www.routledge.com/Understanding-Contract-Law/Austen-Baker-Zhou/p/book/9780367748081
22. Tezaurs. Konkludenta darbība vārdkoptermins. (2024) https://tezaurs.lv/mwe:151955
23. Словарь юридических терминов. Конклюдентные действия.(2023) https://juridical.slovaronline.com/2785

CILVĒKTIESĪBU AIZSARDZĪBAS MEHĀNISMS IESLODZĪJUMA VIETĀS

Ēriks Savinovs
Baltijas Starptautiskā akadēmija, Rīga
Tiesību zinātne
savinoverik9@gmail.com
Zinātniskais vadītājs: Dr.iur., vad.pētnieks Vitolds Zahars

ANOTĀCIJA

Cilvēktiesību aizsardzība brīvības atņemšanas vietās ir viens no katras valsts un pašas sabiedrības galvenajiem uzdevumiem, jo tas atspoguļo tiesiskās un demokrātiskās sistēmas līmeni. Darba zinātniskā novitāte saistīta ar Latvijas sodu izpildes sistēmas problēmu vispusīgu izpēti caur nacionālās un starptautiskās likumdošanas prizmu. Galvenais secinājums ir tāds, ka, lai gan sodu izpildes sistēma ir diezgan attīstīta, joprojām ir dažas problēmas, kuras vēl nav atrisinātas.

Atslēgvārdi: brīvības atņemšana, cilvēktiesības, notiesātie, ieslodzījuma vietas

ABSTRACT

The protection of human rights in places of deprivation of liberty is one of the main tasks of any state and society itself since it reflects the level of the legal and democratic system. The novelty of the scientific work lies in the comprehensive examination of the problems of the Latvian penal system through the prism of national and international legislation. The main conclusion is that, although the enforcement system is quite advanced, there are still some problems that have not yet been solved.

Keywords: custodial sentences, human rights, convicts, prisons

IEVADS. INTRODUCTION

Pēdējo gadu laikā Latvijas ieslodzījuma vietu sistēmā ir notikušas daudzas pārmaiņas, piemēram, ieslodzīto skaits laika posmā no 2019. līdz 2023. gadam samazinājies no 3414 līdz 3271, bet uz 100 tūkstošiem iedzīvotāju - no 179 līdz 175 [15];

Ņemot vērā šos datus, var secināt, ka pēdējo gadu laikā valsts sodu izpildes sistēmā ir vērojamas pozitīvas tendences, bet ņemot vērā, ka Latvijas Sodu izpildes kodekss ir daudzkārt pārskatīts, lai to humanizētu, šīs analīzes rezultāti liecina par nepieciešamību turpināt centienus modernizēt sodu izpildes sistēmu, pielāgojot to mūsdienu prasībām un cilvēktiesību standartiem.

Šī pētījuma mērķis ir analizēt esošos ieslodzīto tiesību un brīvību aizsardzības mehānismus caur nacionālo un starptautisko tiesību aktu prizmu, kā arī saprast, kādas problēmas pastāv sodu izpildes normatīvajā regulējumā un praksē. Pētījumā tiek izmantotas vispārējās zinātniskās pētniecības metodes, kā arī tiesību normu interpretācijas metodes. Pētījumā tiek analizēti un izvērtēti dažādu starptautisko organizāciju atzinumi, kā arī tiek pētīti praktiskie piemēri.

SVARĪGĀKĀS ATZIŅAS TEORIJĀ UN PRAKSĒ. BASIC THEORETICAL AND PRACTICAL PROVISION

No teorētiskā viedokļa Latvijas tiesiskais mehānisms ir attīstīts, jo valsts ir parakstījusi un ratificējusi tādus dokumentus kā Vispārējā cilvēktiesību deklarācija un Eiropas Cilvēktiesību konvencija, kas garantē katras personas personisko tiesību un brīvību ievērošanu, kā arī aizliedz dažāda veida spīdzināšanu, savukārt Latvijas Republikas Satversme nosaka valsti kā demokrātisku un tiesisku valsti, kurai jāievēro cilvēktiesības, tostarp ieslodzījuma vietās [1;2;3].

Eiropas Padomes Spīdzināšanas novēršanas komiteja apsekoja Cēsu nepilngadīgo audzināšanas iestādi, norādot, ka kameras ir labi aprīkotas un tīras. Ieslodzītie ieguva vidējo izglītību, piedalījās teātra un mūzikas pulciņos, sportoja un gandrīz visu dienu varēja tikties ar radiniekiem, tomēr brīvdienās viņiem bija ierobežots laiks brīvā dabā. Eiropas Savienības Pamattiesību aģentūra atzīmēja arī to, ka ieslodzītie tiek informēti par savām tiesībām, kas ir īpaši svarīgi ārvalstniekiem, tomēr viņiem reti tiek nodrošināti video zvani ar tuviniekiem. Personīgā higiēna bija labi uzturēta, un ieslodzītie saņēma tīru apakšveļu un dvieļus, ka arī uzturs ir labs - trīs siltas maltītes dienā un piekļuve dzeramajam ūdenim; grūtniecēm un veģetāriešiem tiek nodrošināts atsevišķs uzturs [7;9].

Neraugoties uz pozitīvajiem aspektiem, Latvija saskaras ar kritiku, jo ne vienmēr tiek ievēroti tādi kriminālsodu pamatprincipi kā aizsardzība pret spīdzināšanu un diskriminācijas aizliegums, jo vispirms 2019. gadā European Prison Observatory sniedza atzinumu par to, ka tika konstatēti ne tikai vardarbības fakti starp ieslodzītajiem, bet arī norādīja uz problēmām, kas saistītas ar mūža ieslodzītajiem, proti, to, ka šai grupai nav strukturētas pieejas izglītībai un/vai nodarbinātībai, un tie ieslodzītie, kuri iesnieguši apelācijas, joprojām tiek turēti kamerās gandrīz neierobežotu laiku, un viņiem nav atļauta saskarsme ar citiem ieslodzītajiem [5;6].

Ieslodzīto saskarsmes problēma turpinājās arī 2020. gadā, kad to skatīja Satversmes tiesā, kurā iesniedzējs apgalvoja, ka ieslodzīto mijiedarbībai ir pozitīva ietekme un tā veicina ieslodzīto resocializāciju, kur šādu apgalvojumu atbalstīja tikai Tiesībsargs un Latvijas Cilvēktiesību centrs, taču valsts iestādes iebilda pret šo ideju, pamatojoties uz to, ka šādas saskarsmes varētu mudināt ieslodzītos atkārtoti izdarīt noziegumus [14].

Problēmas ieslodzīto vidū ar to nebeidzas, bet tieši otrādi – tās turpina attīstīties, kad 2024. gadā Eiropas Cilvēktiesību tiesa atklāja ieslodzīto hierarhiju, kur zemāko kastu pārstāvji tiek pakļauti pazemojumiem un viņiem ir ierobežota piekļuve pamata resursiem, piemēram, medicīniskajai aprūpei vai ēdnīcai, un, pamatojoties uz ziņojumiem, kas saņemti no starptautiskām un nacionālām institūcijām laika posmā no 2012. līdz 2022. gadam, Tiesa atzina, ka valsts neaizsargāja šos ieslodzītos un necentās atrisināt problēmu, tādējādi pārkāpjot Eiropas Cilvēktiesību konvencijas 3. pantu, un dažus mēnešus vēlāk nāca klajā Eiropas Padomes Spīdzināšanas novēršanas komitejas oficiālais ziņojums, kurā arī tika konstatēta kastu sistēmas pastāvēšana, kurā priviliģētie ieslodzītie ekspluatē zemākās šķiras ieslodzītos, un pēdējo sūdzības tiek apspiestas, baidoties no vardarbības [6;11].

Kastu sistēmas jautājumi un vardarbība ieslodzīto vidū rada jautājumu par tiesībām uz kvalitatīvu veselības aprūpi. Teorētiski likumdošanas bāze ir uzbūvēta diezgan labi, proti Latvijas Sodu izpildes kodekss 78. un 78.[1] panti nosaka, ka ar brīvības atņemšanu notiesātajiem medicīniskā aprūpe tiek nodrošināta par valsts budžeta līdzekļiem, tajā skaitā neatliekamā zobārstniecības palīdzība. Eiropas Padomes Ieteikumos Rec (98)7 ir uzsvērta ieslodzīto iespēja saņemt medicīnisko aprūpi 24 stundas diennaktī un pietiekama medicīniskā personāla pieejamība lielajos cietumos, tāpat arī Latvijas Republikas Satversme garantē veselības aizsardzību un tiesības uz medicīnisko minimumu [1;2;3].

Praksē situācija ir atšķirīga. Augstākā tiesa 2020. gadā izskatīja Jelgavas cietumā ieslodzītā lietu, kurš sūdzējās par nekvalitatīvu zobārstniecības aprūpi, sterilizācijas trūkumu un ārstēšanas kavējumiem, taču tiesa viņa sūdzības noraidīja, atsaucoties uz pierādījumu trūkumu, tomēr 2024. gadā Eiropas Savienības Pamattiesību aģentūra sniedza pretēju atzinumu Augstākajai tiesai, norādot, ka šajā cietumā ieslodzītajiem ir ļoti problemātiski saņemt medicīnisko aprūpi naktī, tāpēc

personai ir jāgaida līdz darba dienas sākumam, turklāt Latvijas cietumos ir liels medicīnas personāla trūkums un liels skaits vakanču medicīniskajā aprūpē [13;7].

Problēmas ar medicīniskās aprūpes saņemšanu brīvības atņemšanas vietās pauda arī Latvijas Republikas Tiesībsargs. 2023. gadā tika publicēts ziņojums, kurā konstatētas problēmas Jēkabpils cietumā, kur, lai gan ieslodzītajiem bija pieejama medicīniskā palīdzība, no medicīniskajiem dokumentiem nevarēja saprast, cik kvalitatīva bijusi aprūpe, jo uzskaite bijusi neskaidra un neprecīza. Svētdienās nestrādāja ārstniecības personas, kas ne tikai padarīja neiespējamu kvalitatīvas medicīniskās palīdzības saņemšanu, bet arī radīja medicīnisko medikamentu uzkrāšanās un lietošanas risku personiskām vajadzībām, kā arī bez pamatojuma tika nozīmēta dažādu antipsihotisko līdzekļu lietošana [10].

Šīs divas problēmas mūs noved pie galvenā jautājuma par ieslodzīto tiesību aizsardzību – resocializācijas iespējamību. Tādējādi saskaņā ar Latvijas Sodu izpildes kodekss 4.pantu soda izpildes mērķis ir ieslodzīto resocializācija, ievērojot viņu personiskās tiesības un brīvības [5].

No praktiskā viedokļa resocializācijas programmai ir divējāda daba, jo, no vienas puses, kā to atzīmē profesors Vitolds Zahars, resocializācijas programmām ir svarīgs cietumu vadības aspekts, kā arī secina, ka ieslodzīto resocializācija palīdz socializēt cilvēku un atgriezt viņu sabiedrībā, tādējādi samazinot recidīva līmeni un parādot, ka sods tiek izpildīts humānos apstākļos, kas nodrošina ieslodzītajiem tiesības reintegrācijai sabiedrībā, bet, no otras puses, profesors atzīmē resocializācijas programmu nepilnības, kas izpaužas kā finansējuma un personāla trūkums, un ne visos cietumos var nodrošināt efektīvu resocializācijas programmu, kā arī pašai sabiedrībai var būt negatīva attieksme pret tiem, kuriem ir bijusi sodāmība un kuri sodu izcieta ieslodzījuma formā [8].

Autors var piekrist profesora viedoklim, īpaši tur, kur tika konstatētas nepilnības, uz kurām norādīja gan starptautiskās, gan nacionālās organizācijas. Piemēram, 2018. gadā Augstākā tiesa izskatīja viena Rīgas Centrālcietuma ieslodzītā sūdzību par ieslodzījuma vietu pārslodzi un sliktu ventilāciju un apgaismojumu, kas, viņaprāt, pasliktināja dzīves apstākļus. Augstākā tiesa norādīja, ka apgalvojums par kameru pārslodzi neatspoguļo cilvēktiesību un brīvību pārkāpumu, jo jāņem vērā ne tikai kameras platība, bet arī faktiskās pārvietošanās iespējas un pats kameras plānojums, savukārt attiecībā uz ventilāciju Tiesa uzskatīja, ka kamerā tika nodrošināta dabiska ventilācija, ko ieslodzītie varēja regulēt, un nebija pierādījumu, ka iesniedzējs sūdzējās par sliktu ventilāciju [12].

Pretējs viedoklis bija European Prison Observatory, kur vērtēja ieslodzījuma vietu stāvokli Latvijā, norādot, ka lielākā daļa no tiem ir vecāki par 115 gadiem un tikai 16% ir atjaunoti. Daugavgrīvas cietums Daugavpilī izceļas ar sliktiem sanitārajiem apstākļiem un ventilācijas trūkumu, kas pārkāpj ieslodzīto tiesības, savukārt Latvijas Republikas Tiesībsargs secināja, ka resocializācija ir nepietiekama, un netiek aizsargātas mūža ieslodzīto tiesības un brīvības. Lai gan kameras ir tīras un kārtīgas, tās ir pārāk mazas, un retās psiholoģiskās nodarbības neatbalsta viņu garīgo stāvokli. Ieslodzītie var strādāt, taču šis darbs ir neregulārs un slikti apmaksāts [9;10].

Pamatojoties uz visu iepriekš minēto, autors secina, ka, lai gan valstī ir izveidots labs cilvēktiesību aizsardzības mehānisms, tomēr starptautiskās un nacionālās organizācijas norāda, ka joprojām nav atrisināti būtiski jautājumi, īpaši attiecībā uz attieksmi pret notiesātajiem un viņu tiesībām, kas liek loģiski domāt par nepieciešamību modernizēt sodu sistēmu.

PĒTĪJUMA REZULTĀTI UN TO IZVĒRTĒJUMS. RESEARCH RESULTS AND THEIR EVALUATION

Pētījuma rezultāti liecina, ka, lai arī Latvijas sodu izpildes sistēma attīstās un vērojams labs progress attiecībā uz nepilngadīgajiem un savlaicīgu informēšanu par tiesībām un pienākumiem, joprojām neatrisināti paliek būtiski jautājumi, īpaši attiecībā uz attieksmi pret ieslodzītajiem un viņu tiesībām. Gan nacionālo, gan starptautisko organizāciju novērtējumi izceļ tādas problēmas kā vardarbība ieslodzīto vidū, sliktas kvalitātes medicīniskā aprūpe, un joprojām pastāv jautājums par cietumu ēku atjaunošanu. Kopumā novērtējums liecina, ka, neraugoties uz dažiem pozitīviem aspektiem, joprojām nav atrisinātas sistēmiskas problēmas, kas ietekmē centienus resocializēt ieslodzītos un vēl vairāk humanizēt un demokratizēt sodu izpildes sistēmu.

KOPSAVILKUMS. CONCLUSION

1. Latvijas ieslodzījuma vietu sistēma, lai gan tai ir daži pozitīvi aspekti, joprojām uzrāda būtiskus trūkumus ieslodzīto cilvēktiesību aizsardzībā, jo īpaši attiecībā uz medicīnisko palīdzību vai kastu sistēmu ieslodzīto vidū.
2. Ir steidzami nepieciešamas visaptverošas reformas, lai risinātu sistēmiskās problēmas, ko konstatējušas dažādas valsts un starptautiskās iestādes, jo pašreizējie mehānismi nav pietiekami, lai nodrošinātu ieslodzīto tiesības un cieņu.
3. Konstatējumi liecina, ka valsts nav piešķīrusi pienācīgu prioritāti šo cilvēktiesību pārkāpumu novēršanai, tāpēc ir nepieciešama aktīvāka pieeja, lai uzlabotu apstākļus brīvības atņemšanas vietās.

LITERATŪRAS UN AVOTU SARAKSTS. REFERENCES

1. Latvijas Republikas Satversme (15.02.1992.), spēkā no 07.11.1992. ar groz. uz 01.01.2019. Latvijas Vēstnesis, 204(6290). Retrieved from: https://likumi.lv/doc.php?id=57980
2. Apvienoto Nāciju Organizācijas Vispārējā cilvēktiesību deklarācija. Pasludinājusi Apvienoto Nāciju Organizācijas Ģenerālā Asambleja 1948. gada 10. decembris ar 217. A (III) rezolūciju. Retrieved from: https://www.un.org/ru/documents/decl_conv/declarations/declhr.shtml
3. Eiropas cilvēka tiesību un pamatbrīvību aizsardzības konvencija (04.11.1950), spēkā no: 03.09.1953. Retrieved from: https://eur-lex.europa.eu/legal-content/LV/ALL/?uri=LEGISSUM:eu_human_rights_convention
4. Recommendation Rec(98)7 Of The Committee Of Ministers To Member States Concerning The Ethical And Organizational Aspects Of Health Care In Prison. Retrieved from https://rm.coe.int/09000016804ef613
5. Latvijas Sodu izpildes kodekss. (23.12.1970.), spēkā no 01.04.1971. ar groz. uz 30.06.2025Latvijas Padomju Sociālistiskās Republikas Augstākās Padomes un Valdības Ziņotājs, 1. Retrieved from: https://likumi.lv/ta/id/90218-latvijas-sodu-izpildes-kodekss
6. Committee for the Prevention of Torture (2019). Report to the Latvian Government on the visit to Latvia carried out by the European Committee for the Prevention of Torture and Inhuman or Degrading Treatment or Punishment (CPT). Retrieved from https://www.coe.int/en/web/cpt/-/council-of-europe-anti-torture-committee-publishes-report-on-its-2024-ad-hoc-visit-to-latvia
7. Pūce Ilvija (2024). Report form European Union Agency for Fundamental Rights: Criminal Detention in the EU: Conditions and Monitoring. Fundamental Rights Agency: Vienna. Retrieved from https://fra.europa.eu/sites/default/files/fra_uploads/latvia-criminal-detention-2024-country-study_en.pdf
8. Zahars Vitolds (2021). Kriminālsodi formālā un neformāla skatījumā. Daugavpils: Akadēmiskais apgāds "Saule"
9. Kamenska Anhelita, Antigone Edizioni (2019). Prison conditions in Latvia: 2nd edition. European Prison Observatory: Rome. Retrieved from: https://www.coe.int/en/web/cpt/-/council-of-europe-anti-torture-committee-publishes-report-on-its-2024-ad-hoc-visit-to-latvia
10. Latvijas Republikas Tiesībsarga 2023. gada ziņojums. Retrieved from https://www.tiesibsargs.lv/wp-content/uploads/2025/01/tiesibsarga_2023_gada_zinojums_pieklustams.pdf
11. Eiropas Cilvēktiesību tiesas lieta Nr. 76680/17: CASE OF D v. LATVIA (2024).
12. Latvijas Republikas Augstākās tiesas Senāta Administratīvo lietu departamenta 2018.gada 7.jūnija SKA-207/2018.

13. Latvijas Republikas Augstākās tiesas Senāta Administratīvo lietu departamenta 2020.gada 30.jūnija SKA-174/2020.
14. Latvijas Republikas Satversmes Tiesa 2021.gada 15.janvārī spriedums lietā Nr.2020-21-01
15. Ieslodzījuma vietu pārvaldes statistika. Retrieved from https://www.ievp.gov.lv/lv/oficiala-statistika

MŪSDIENU SOCIĀLĀ PSIHOLOĢIJA: TEORIJA UN PRAKSE

MODERN SOCIAL PSYCHOLOGY: THEORY AND PRACTICE

MODERN TRENDS IN IMPROVING HIGHER EDUCATION IN UKRAINE

Svitlana Reznik
Ukraine
National Technical University "Kharkiv Polytechnic Institute"
PhD in Pedagogy, associate professor
Svitlana.Reznik@khpi.edu.ua
Hanna Kuznetsova
Ukraine
National Technical University "Kharkiv Polytechnic Institute"
Doctoral student
Study programme: Educational, pedagogical sciences
hannakuznetsova23@gmail.com

ABSTRACT

Modern trends in improving higher education in Ukraine are focused on quality assurance, internationalisation and digitalisation. Comparison of the results of the student and faculty surveys conducted in 2021 and 2025 indicates an expanded understanding of the factors of effective higher education. Against the backdrop of the ongoing war, new demands are being made on the university environment, which should be psychologically supportive, focused on human needs, fundamentalisation of knowledge and teacher leadership.

Keywords: digitalisation, fundamentalisation, internationalisation, psychological competence, quality assurance, stress resistance, teacher leadership

АННОТАЦІЯ

Сучасні тенденції вдосконалення вищої освіти в Україні зосереджені на забезпеченні якості освіти, інтернаціоналізації і цифровізації. Порівняння результатів анкетування студентів і викладачів, проведеного у 2021 і 2025 рр., вказують на розширення уявлень про чинники ефективної вищої освіти. На тлі продовження війни формуються нові запити до університетського середовища, яке має бути психологічно підтримувальним, орієнтованим на людські потреби, фундаменталізацію знань та викладацьке лідерство.

Ключові слова: цифровізація, фундаменталізація, інтернаціоналізація, психологічна компетентність, забезпечення якості, стресостійкість, викладацьке лідерство

INTRODUCTION

The higher education system in Ukraine is undergoing transformational processes due to both global and national challenges, in particular the armed aggression of the Russian Federation. In this context, there is a need for a comprehensive study of current trends in the improvement of higher education, which determine new priorities in the management, content, forms and methods of organising the educational process. The relevance of the study is stipulated by the need to form a high-quality, flexible and sustainable system of higher education capable of responding to the challenges of wartime, as well as to provide training for the post-war restoration of the state.

The purpose of the study is to identify the leading trends in the improvement of higher education in Ukraine in the context of modern transformations and to compare the perceptions of the academic community regarding these trends that dominated in the period before the outbreak of a full-scale war (2021) and in the context of its ongoing impact (2025).

The research included an analysis of theoretical sources and an empirical study of the positions of the main subjects of the educational process – students and lecturers.

The study methods included: analysis and synthesis of scientific and regulatory sources, a questionnaire survey to study the perception of key trends in improving higher education in Ukraine, and a comparative analysis of the results of the 2021 and 2025 surveys. The questionnaire survey was conducted at the National Technical University "Kharkiv Polytechnic Institute" (Ukraine) and covered 146 respondents (94 students and 52 lecturers) in 2021 and 155 respondents (112 students and 43 lecturers) in 2025.

BASIC THEORETICAL AND PRACTICAL PROVISION

According to the modern scientific and educational paradigm, the transformation of higher education in Ukraine is driven by the need to ensure, in particular, the quality of education, its internationalisation and digitalisation. These aspects, which have remained relevant in the European and global educational space over the past decade [1, 2, 5, 6], remain important for Ukrainian society.

At the same time, the military situation has led to the actualisation of new challenges – the growing role of psychological competence, the need to fundamentalise knowledge and the need to develop teacher leadership.

Theoretical analysis shows that ensuring the quality of higher education requires not only compliance with formal standards, but also the implementation of a student-centred approach that focuses on the needs, activity and personal development of students [3]. The internationalisation of higher education is seen as a process of including universities in the global academic space, which involves mobility, international academic cooperation, and the introduction of English-language programmes [6]. Digitalisation, in turn, includes the intensive introduction of digital technologies, distance learning platforms and artificial intelligence into the educational process [2, 5].

Concurrently, during the war, the need to strengthen the psychological competence of participants in the educational process, including the development of stress resistance, emotional self-regulation, communication skills and psychological well-being, has increased significantly [8]. The need to fundamentalise knowledge is related to the need to train highly qualified specialists for the fields of defence, security, engineering, healthcare and infrastructure reconstruction.

At the same time, teacher leadership can be important for improving education, as it improves the quality of the teacher's work and the institutional capacity of the organisation where the teacher works [7]. Teachers with developed teaching leadership are agents of change [7], and leadership itself is associated with meeting the psychological needs of students [4].

RESEARCH RESULTS AND THEIR EVALUATION

During the research, a questionnaire survey was conducted among Ukrainian students and teachers at NTU "KhPI" in 2021 and 2025. The purpose of the survey was to identify the peculiarities of the respondents' perception of the most relevant trends in improving higher education in these periods. The survey included the following questions:

1. In your opinion, what are the most important directions for improving higher education in Ukraine?
2. Do you think it is necessary to develop teaching leadership in the higher education system as a factor of its improvement?

In 2021, the survey results showed that 82% of respondents (70% of students and 94% of lecturers) identified quality assurance in education as the main direction of development. Internationalization was named a priority by 65% of respondents, and digitalization by 59%.

In 2025, the priorities have changed. The quality of education was closely linked to digitalisation in the responses, which is explained by the distance learning in Kharkiv in the current conditions in Ukraine. In their answers, 70% of students and 81% of teachers linked one trend to the other.

It should also be noted that 77% of respondents noted the need to develop psychological competence (in particular, 88% of students and 64% of teachers), 69% – indicated the need to fundamentalise knowledge, and 62% – noted the importance of strengthening student-centred learning.

Respondents in 2025 paid special attention to teacher leadership: 53% of all respondents (47% of students and 65% of teachers) indicated that developing teacher leadership is a prerequisite for improving the quality of education, motivating students, and creating a supportive educational environment. Compared to 2021, when this figure was only 18%, the increase is significant and indicates a rethinking of the role of the teacher in the modern educational space. At the same time, respondents stressed that a teacher leader is able not only to transmit knowledge, but also to inspire, support, develop critical thinking and promote students' psychological well-being.

Compared to the results of 2021, there has been a significant increase in attention to the humanitarian and emotional dimension of education, reflecting the adaptation of the higher education system to military challenges. At the same time, the areas of quality assurance, digitalisation and internationalisation have not lost their relevance, although they have undergone some changes in line with current demands.

CONCLUSION

The results of the study showed that current trends in the improvement of higher education in Ukraine are characterised by dynamics that reflect both global and national challenges. Quality assurance, internationalisation and digitalisation remain important guidelines for educational policy, but the current situation in the country has highlighted additional priorities – the development of psychological competence, fundamentalisation of knowledge, student-centred learning and, especially, teacher leadership.

Teacher leadership is emerging as a central factor in the modernisation of the educational process, combining innovation, value orientation, emotional support for students and responsibility for the quality of knowledge. Increased attention to this aspect indicates a growing understanding of the role of the individual teacher as an agent of change in higher education. The development of leadership in teachers will not only improve the quality of education, but also contribute to the formation of a psychologically safe educational environment.

Thus, the improvement of higher education in Ukraine in the coming years should be based on a balanced combination of innovative, humanitarian and security approaches. The higher education system should become not only a tool for professional training, but also a space for the development of a stress-resistant, responsible and leadership personality capable of effective work in the face of uncertainty and post-crisis recovery of the state.

REFERENCES

1. Dolacek-Alduk, Z., Sigmund, V., & Loncar-Vickovic, S. (2008). Quality Assurance of Higher Education in a European Higher Education Area (EHEA). *Tehnicki vjesnik-technical gazette*, *15*(1), 39-44.
2. García-Morales, V., Garrido-Moreno, A., & Martín-Rojas, R. (2021). The Transformation of Higher Education After the COVID Disruption: Emerging Challenges in an Online Learning Scenario. *Frontiers in psychology*, *12*, Article 616059. https://doi.org/10.3389/fpsyg.2021.616059

3. Klemencic, M. (2017). From Student Engagement to Student Agency: Conceptual Considerations of European Policies on Student-Centered Learning in Higher Education. *Higher education policy*, *30*(1), 69-85. https://doi.org/10.1057/s41307-016-0034-4
4. Moreno-Casado, H., Leo, F. M., López-Gajardo, M. A., García-Calvo, T., Cuevas, R., & Pulido, J. J. (2022). Teacher leadership and students' psychological needs: A multilevel approach. *Teaching and Teacher Education*, *116,* Article 103763. https://doi.org/10.1016/j.tate.2022.103763
5. Petrovica, S., Anohina-Naumeca, A., & Avanesova, J. (2022). The Impact of Digitalisation of Higher Education: The Case of Latvia and Nordic-Baltic Region. *Applied computer systems*, *27*(1), 19-29. https://doi.org/10.2478/acss-2022-0003
6. Prieto-Gutiérrez, J. (2024). The Internationalization of Higher Education Beyond 2030. *Journal of higher education policy and leadership studies*, *5*(3), 180-191. https://doi.org/10.61186/johepal.5.3.180
7. Smylie M.A. (1995). New perspectives on teacher leadership. *Elementary School Journal*, 96(1), 3-7. doi: 10.1086/461811
8. Zhvaniia, T., Yelchaninova, T., Hrytsuk, O., Pidbutska, N., & Drozdova, D. (2024). Psychological Preconditions of Conflict Proneness of Personality and Mental Health: The Role of Self-Regulation, Emotional Intelligence and Mutual Understanding in The Context of Interpersonal Relations. South Eastern European Journal of Public Health, 145–162.