

STANDPOINT

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1. General Information

This standpoint has been prepared on the basis of Order No. RAS-34/30.03.2026 of the Rector of the University of Agribusiness and Rural Development for the appointment of a scientific jury for the defense of a dissertation, as well as a decision of the scientific jury from its first meeting, recorded in Protocol №PAC-80/08.04.2026.

Author of the dissertation: Dr. Uliana Ivaniuk

Title of the dissertation: FINANCIAL POLICY OF FORMING THE RESILIENCE OF THE SOCIO-ECONOMIC SYSTEM OF UKRAINE IN THE CONDITIONS OF GLOBAL INSTABILITY

Field of higher education: 3. Social, Economic and Legal Sciences

Professional field: 3.8. Economics

Scientific specialty: Finance and Banking

Primary unit: Department of Economics and Finance

Hosting structural unit: Department of Economics and Management

2. General description of the dissertation work

The dissertation examines the resilience of the socio-economic system of Ukraine in the context of modern external shocks, with an emphasis on the role of public policies and applicable tools. The aim of the research is “to substantiate the theoretical and methodological foundations and to develop applied recommendations for the formation and implementation of mechanisms to enhance the resilience of Ukraine's social and economic system within the framework of state regulation of national economic development under conditions of global instability.” (p. 7).

The dissertation comprises a total of 384 standard pages, of which the main body – consisting of an introduction, a six-chapter exposition, and a conclusion, amounts to 345 pages. The remaining part includes the stated scientific and applied contributions, the list of references, and the appendices.

The introduction justifies the relevance of the research problem and outlines the object and subject of the study, along with its aim and objectives. It formulates a main hypothesis and four auxiliary hypotheses, and presents the

research methods employed, the information base, and the extent to which the problem has been addressed in the scientific literature.

Chapter One examines the scientific foundations of the resilience of Ukraine's socio-economic system in the context of global instability. The content of the concept of "resilience" is clarified, the main theoretical approaches to its study are reviewed, and the interdisciplinary nature of the problem is substantiated. Based on an analysis of strategic documents and policies, particular attention is paid to the internal factors (driving forces) and adaptation mechanisms determining the system's resilience, as well as to contemporary approaches to its management in the context of the war, post-war recovery, and Ukraine's European integration.

Chapter Two develops a methodology for studying the resilience of Ukraine's socio-economic system by successively analyzing global risks and megatrends, systematizing the characteristics, types, and determinants of resilience, and critically reviewing existing methodological approaches to its assessment. The author proposes an original conceptualization and methodological framework based on a multidimensional assessment scheme, covering genesis-based, retrospective, comparative, and determinological perspectives, along with a system of indicators that allows for the analysis of the impact of shocks and the system's capacity for adaptation and recovery.

Chapter Three provides an empirical analysis of the factors determining the resilience capacity of Ukraine's socio-economic system, with a sequential focus on financial-economic, socio-demographic, and institutional-governance dimensions. It concludes that structural economic weaknesses, demographic imbalances, and institutional deficiencies limit system resilience, whereas social mobilization, institutional strengthening, and international support are identified as key drivers of adaptation and recovery under conditions of deep external shocks.

Chapter Four conducts a comprehensive diagnosis of the resilience of Ukraine's socio-economic development based on the author's methodological approach proposed in Chapter Two. Using comparative, retrospective, and determinant analysis, it examines the determinants of resilience in an international context and evaluates the system's response to major external shocks. The results indicate that the full-scale war in 2022 has the strongest and most multidimensional destabilizing effect, while the 2008 – 2009 global financial crisis, the 2013 – 2014 socio-political crisis, and the COVID-19 pandemic lead to more limited, though still significant, disruptions, with the system exhibiting a relatively higher capacity for adaptation and recovery.

Chapter Five substantiates the key priorities and directions for strengthening the resilience of Ukraine's socio-economic system under conditions of

war and post-war recovery, drawing on and adapting European experience. The author advances an integrated framework of policies and measures for development, grounded in innovation and technological upgrading, digitalization, structural transformation, and deeper international integration, supported by effective institutional governance.

Chapter Six examines and systematizes the mechanisms for organizational and financial support of the resilience of Ukraine's socio-economic system, including in an international context. It identifies priority areas and analyzes change management processes under wartime conditions, emphasizing the role of "rollback" mechanisms, monitoring systems, impact assessment, and strategy adaptation. The author proposes a conceptual and applied framework for optimizing these mechanisms, encompassing their classification, the formalization of interrelations, and the development of a simulation-based economic and mathematical model to assess their effectiveness. While the methodological toolkit ensures theoretical rigor, it remains somewhat abstract and only partially supported by empirical validation.

The conclusion of the dissertation summarizes the main theoretical, methodological and applied results of the research. The author emphasizes the importance of resilience as a strategic characteristic of socio-economic systems under conditions of global instability, systematizes the key internal and external factors shaping it, and justifies the need to implement a complex, coordinated, and innovation-oriented policy and governance approach aimed at structural modernization, institutional strengthening, digitalization, and enhancing the competitiveness of the economy.

3. Evaluation of the structure and content of the dissertation

From a structural and content perspective, the dissertation follows a coherent and logically consistent framework aligned with its main aim and research objectives. The exposition is well integrated, with clear connections between its parts. The chapters are systematically organized – Chapter One addresses the theoretical foundations, Chapter Two develops the methodology, Chapter Three provides an empirical assessment of resilience factors, Chapter Four offers an in-depth analysis of resilience under various external shocks, Chapter Five formulates policy directions and practical solutions, and Chapter Six develops mechanisms and models for their optimization.

Particular merit should be attributed to the fact that the developed methodological approach is consistently employed as a foundation for the subsequent analysis and for the formulation of conclusions and recommendations. The sound structuring of the text is further supported by the internal organiza-

tion of the chapters into clearly delineated subsections, which contributes to a balanced and coherent presentation of the issues under research.

The exposition is stylistically sound, marked by a high level of scientific precision and proper referencing, and is written in excellent academic English.

4. Evaluation of the Dissertation Abstract

The abstract includes all required components: the length and structure of the dissertation, a general overview, a concise presentation of its content, the scientific and applied contributions (including the practical relevance of the results), a list of related publications, and a declaration of originality. It faithfully reflects the structure, logic, and content of the dissertation.

The research findings have been disseminated through participation in scientific forums and published in a substantial body of work (49 publications), including 6 monographs (5 single-authored and 1 co-authored), as well as articles and conference papers. Some of the publications are indexed in the international databases Scopus and Web of Science, which attests to their scientific visibility and recognition.

The submitted declaration indicates that the candidate substantially exceeds the minimum national scientometric requirements with respect to both publication activity and citation impact.

5. Evaluation of the Contributions of the Dissertation (Scientific and Applied)

The author formulates a substantial number of contributions that reflect the comprehensive nature of the research, distinguishing between results obtained for the first time, improved results, and further developed results. I accept this classification and propose their consolidation and systematization into the following main groups:

1. Scientific Contributions:

- **Further development of the theoretical aspects and conceptual apparatus related to the resilience of socio-economic systems**, through systematization and integration of various scientific directions and approaches, revealing its interdisciplinary nature, as well as formulation of an expanded and more precise author's definition, emphasizing the system's ability to recover and re-orient after the impact of external global shocks and challenges through the use of internal adaptive mechanisms (Chapter One).

- **Development and enrichment of the theoretical and conceptual basis of the research**, building on the systematized theoretical foundations and encompassing a structural conceptualization of resilience, an extended classification of resilience factors (drivers) and types, as well as a systematization of

the principles for ensuring resilience under conditions of global instability (primarily Chapter Two).

- **Creation of an original methodological toolkit for studying and assessing the resilience of socio-economic systems**, based on an integrated analytical approach encompassing genesis-based, retrospective, comparative, and determinological analysis, and enabling a comprehensive assessment of the impact of external shocks and the system's capacity for adaptation and recovery (Chapter Two).

II. Applied Contributions:

- **Application of the developed methodological approach to assess the resilience of Ukraine's socio-economic system** through an empirical analysis of the factors shaping its resilience capacity (Chapter Three), followed by a comprehensive diagnosis of the system's response to various external shocks using comparative, retrospective, and determinological analysis (Chapter Four).

- **Development of a conceptual and applied framework for enhancing the resilience of Ukraine's socio-economic system**, based on the adaptation of European experience and the integration of priorities related to innovation and technological development, digitalization, structural transformation, and coordinated economic policy under conditions of war and post-war recovery (Chapter Five).

- **Development of a methodological approach for optimizing the use of mechanisms for organizational and financial support of the resilience of Ukraine's socio-economic system**, complemented by simulation-based economic and mathematical modeling as a tool for analysis and evaluation. The model enables the identification of key influencing factors, the analysis of alternative scenarios, and the assessment of the effectiveness of managerial decisions under conditions of war and post-war recovery (Chapter Six).

Through these contributions, the research both advances the existing theoretical and methodological foundations of resilience and offers substantiated, integrated, and practice-oriented solutions for managing and strengthening the resilience of Ukraine's socio-economic system, with potential applicability in other economies facing global instability.

6. Critical Remarks and Recommendations

Despite the undisputed merits of the dissertation, a number of critical remarks and recommendations can be offered:

First, there is a certain lack of full alignment between the title of the dissertation, on the one hand, and its stated aim and content, on the other. Although the topic is positioned within the field of financial policy, both the introduction and the main body extend beyond its boundaries, encompassing a

broader range of economic and governance aspects, which leads to a degree of discrepancy between the declared focus and the actual content of the work.

Second, the empirical analysis relies predominantly on data covering the period up to and including 2022, which, given the rapidly evolving economic and geopolitical environment, to some extent constrains the timeliness of the conclusions. Future research should incorporate more recent data reflecting the latest stages of crisis dynamics and post-war recovery.

Third, the model-based methodological approach proposed by the author in Chapter Six for the analysis and optimization of resilience support mechanisms is original and characterized by a high degree of theoretical substantiation and formalization. At the same time, it could be further complemented in future research by empirical validation through application to specific data and scenarios, which would allow for a more comprehensive demonstration of its analytical and predictive potential.

The above remarks are of a predominantly clarifying and recommendatory nature and do not diminish the overall positive assessment of the scientific and applied merits of the dissertation.

7. Question to the Candidate for the Degree of Doctor of Sciences

With reference to the model-based methodological approach proposed in Chapter Six, what opportunities do you see for its empirical application and validation using up-to-date data, as well as for its further development through the formulation of specific scenarios for the evolution of Ukraine's socio-economic system in the post-war period?

8. Conclusion:

The submitted dissertation complies with the requirements of the applicable national regulations and the internal regulatory framework of the University of Agribusiness and Rural Development. Through this work, the author demonstrates a high level of scientific maturity, an interdisciplinary research approach, and excellent competencies in applying advanced analytical tools to the analysis of complex socio-economic processes.

The dissertation is characterized by the pronounced relevance and significance of the research problem, as well as by the scientific soundness and originality of the proposed solutions. The scientific and applied results obtained are substantial and contribute to the development and enrichment of scientific knowledge in the field of resilience of socio-economic systems and the role of state regulation under conditions of global instability. The author's ideas, conclusions, and recommendations have been disseminated through a substantial number of academic publications and have received broad scientific validation.

No evidence of plagiarism has been identified in the submitted dissertation.

On the basis of the above, I give a **highly positive evaluation** of the dissertation and **recommend** that the esteemed members of the Scientific Jury **vote in favor of awarding the degree of Doctor of Sciences** in the field of higher education 3. Social, Economic and Legal Sciences, professional field 3.8. Economics, scientific specialty “Finance and Banking” to Dr. Uliana Ivaniuk.

29.04.2026

Member of the Scientific Jury:

Assoc. Prof. Vanya Tsonkova, PhD